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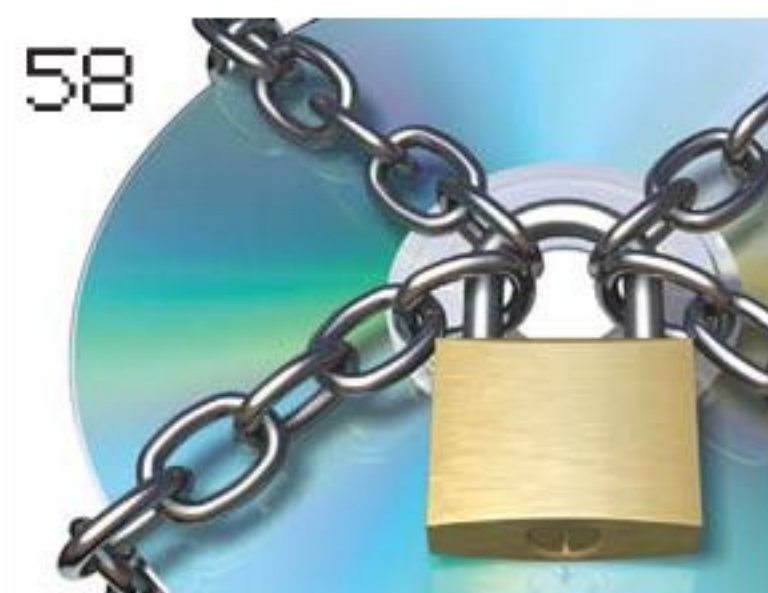
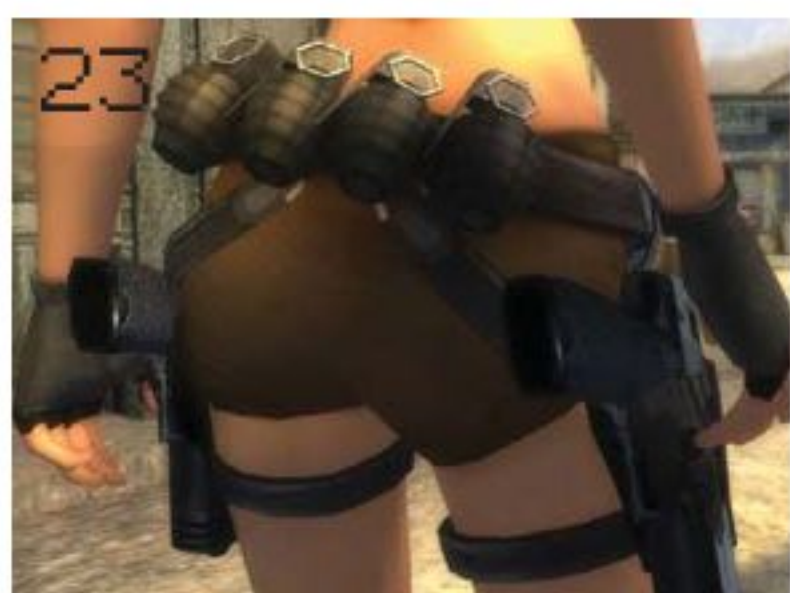
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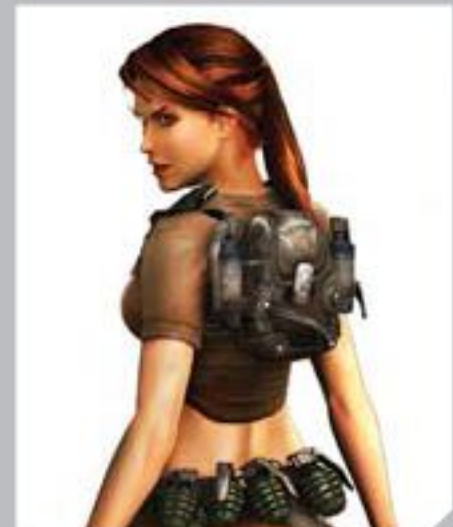
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Blitz's 1-Up-manship sets sail

Stalwart UK independent reveals plan to help other Britsoft firms • Stickman Studios signed as first partner

by Ed Fear

Blitz Games Studios has unveiled a new scheme to help fledgling developers find their feet and get their games released.

Called 1-Up, the UK independent stalwart wants the scheme to use its resources to help smaller developers get their titles to a wider marketplace, including frontiers such as console digital distribution typically hard to approach by small studios.

"In the current climate it's very hard for a small team to realise their goals on some of the larger platforms. We have the resources and experience to help them out," Chris Swan, business development director of Blitz Arcade told *Develop*.

"With more than 230 employees, we've amassed development experience in most areas, from solid work-for-hire titles for retail and download to generating our own IP and self-publishing. The resources we can offer



through Blitz 1-Up are substantial."

The range of services potentially on offer ranges from resources such as audio and QA to the company's established and cross-platform BlitzTech engine, access to its PR department and even funding. Even less tangible things such as access to Blitz's network of contacts

could prove extremely useful, said Swan.

"We've been an independent company for 17 years and have built up a huge address book of clients across all channels, so another option is to simply match a developer to an appropriate publisher."

The scheme is something that Blitz has been doing on an informal ad-hoc basis in the past, such as the collaboration with Middlesbrough studio 3rd Dimension Creations (previously revealed in *Develop* 86). But applying an official name to the scheme means more than just publicising such a potential partnership, explained Blitz CEO Philip Oliver.

"We've already been practising this initiative to some extent. Previously it's been handled on an ad hoc basis, with us simply taking advantage of opportunities as they came up. We've formalised the process into Blitz 1-Up to show other potential partners what we can offer, while we also work on scaling up our internal support for what looks to be a very successful venture."

Its first official partner is Stickman Studios and its game *Buccaneer: The Pursuit of Infamy*. Stickman had been doing some external artwork for Blitz, and showed them the title in development.

"We loved it," enthused Oliver, "so we offered them a deal to get them to the finish line."

Each deal will be tailor-made with the developer depending on their needs, with the financial terms decided appropriately. The programme doesn't preclude the option of the developer keeping the IP, either.

"In the case of *Buccaneer*, the IP stays with Stickman, while with another title we've purchased the intellectual property rights," said Swan. "It's down to what makes sense in the given situation. If a partner wants Blitz to put it's full support behind their game, it could make sense to sell the IP."

Currently in 'soft beta', 1-Up will be starting small as Blitz itself scales support staff to manage the relationships. "Although we're one of the largest independent developers, we don't have infinite resources," continued Swan. "We're launching with a soft beta, so we can choose partners that fit with our available resources. It also gives us time to scale up internally to increase our capacity at a safe growth rate."

"People who know Blitz will know that 1-Up definitely an extension of our ethics, but we'll be aiming to make a profit from each partner so it absolutely has to make commercial sense for both parties. That's not to say that we're trying to become a fully-fledged publisher either – it's simply about broadening the opportunities open to less experienced developers."

www.blitzgamesstudios.com

**"We've
formalised the
process to
show what we
can offer..."**

Philip Oliver, Blitz



Editorial

Blame Canada?

I don't think it's wrong to say that the Canadian games scene has caused much ire amongst *Develop* readers in recent years.

The region's phenomenal expansion, to the point where it has overtaken the UK in term of workforce size and commercial worth – and probably stolen a chunk of staff and potential contracts along the way – has been a widely-reported point of umbrage for many that like to fly the flag for British games developers. Indeed, it's a key piece of evidence for the Games Up? campaign, which says that the tax breaks available in some parts of the country (and have encouraged that massive growth of the local scene) have distorted the market unfairly.

But the country tends to get a raw deal from UK developers too keen to pour scorn on the region and write off its successes as driven purely by (admittedly generous) tax incentives, in comparison to their own.

For a start, there are some serious gaps in knowledge about otherwise well-established facts about Canada. Namely that despite what conventional wisdom might tell you, it doesn't provide tax breaks to all developers in the country. In fact by it's very federal nature, it is each province which decides local tax breaks and subsidies. So bear in mind that while grants are available in Quebec, PEI, Manitoba, Ontario and Nova Scotia – and have driven up the size of their respective regions' industries – there are no such benefits in place in the likes of British Columbia. Y'know, the state in which Vancouver, the biggest Canadian games city, is located. So tax breaks are only part the story – and only go so far to explain why the country has amassed such a critical mass of staff.

The other half of the story is of course talent and the actual games the region has pumped out. And is it any surprise that for a large number of developers the chance to go work on titles like *Assassin's Creed*, *Company of Heroes*, *Super Monkey Ball* iPhone or EA's sports games represents an attractive proposition? Of course not. So the UK industry shouldn't be so prepared to write off what has been a global games success story – especially when it's all too easy to perceive such criticisms as jealousy of the region's achievements rather than concerns over unfair competition.



Michael French

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Michael

Going with Gusto

As it enters its fifth year of business, leading UK independent Gusto Games is about to step into new territories



Simon Phillips, Gusto managing director



by Ed Fear

Banbury-headquartered Gusto Games is celebrating its fifth birthday this month, and at the sametime is preparing to expand its product offering into new areas.

Founded by a group of ex-Silicon Dreams team members after its demise in 2003, Gusto originally set its focus on the sport games sector, capitalising on previous experience.

"We have a huge sports heritage amongst the teams here, predating Gusto by quite some time," said MD Simon Phillips. "It's a reputation that I've been very happy with and one that I want to continue to build on."

And while that's something the studio is proud of, Gusto also has plans above and beyond sport – plans which lead the team to open a second studio in Derby in 2007 staffed largely by ex-Core Design staff members. It now has a contract in place with Scholastic to develop two games based on the children's book firm's IPs.

"We want to keep the reputation as 'sports specialists' – where better to get sports games from than a specialist, right? But at the same time, we also want to create a separate reputation for other genres. It's not always as easy as this, but it forms a large part of the

future strategy of the group," explained Phillips.

Such a strategy requires a significant amount of talent, and with 80 staff working on more than four projects over two locations, that's quite a change from the 'handful' that the studio started at. That growth hasn't always been an easy experience, he said.

"The UK has always been a great breeding ground for new ideas and I don't see why that will change..."

**Simon Phillips,
Gusto Games**

"It's been a tough one, no two ways about it. Attracting good talented team members is hard enough, marrying them up with good projects that fit not only the company's goals but teams skills is tricky too – then comes the commercial side of things. One of the absolute key

factors in running any business, but more so one in such a creative sector, is that you have to keep your feet on the ground and retain a sense of commercial awareness. It's very tempting to get swept up by the latest concept or style of entertainment, but you have to be realistic about the basic business principles of it. If we want to develop something that means that we are going to have to grow in numbers; it needs to have long term potential and be an area that we are really going to commit to."

As a developer that's made it past the five year mark, how does it see the next five years going? "There will always be a future for independent development in the UK. As long as we are sensible and clever with our application of resources and use of technology we can get our creative ideas into projects that are commercially viable."

"The UK has always been a great breeding ground for new ideas and I don't see why that will change. We've all read the publications about the talent and creative draw overseas; that combined with the general financial and business climate right now makes it incredibly difficult. Sure, it's not ideal, but it just forces us to be a little more creative and find new ways to deliver and keep the UK right up there as the best."

www.gustogames.com

Making an Endrant

The economic climate's forecast might be turbulent, but that hasn't stopped the formation of a new independent studio in the UK



Kent-based Endrant is developing the multiplayer part of id's new Wolfenstein title (pictured)

by Ed Fear

A new independent studio has opened its doors in the UK – and debut team Endrant has not only scored a co-development deal with one of the biggest US studios but is already flying the flag for Britsoft by thrown its weight behind Tiga and ELSPA's 'Games Up?' lobbying campaign.

Founded by Ben Smedstad and Neil Postlethwaite, creative director and co-owner respectively, Kent-based Endrant is busy working on the multiplayer portion of id and Activision's new *Wolfenstein* game.

Collaborating on a component of another studio's title – even one as prestigious as *Wolfenstein* – might not sound like the ideal start for a new team, but the deal not only benefits Activision, but Endrant itself, helping the team stay manageable at 18 staff while allowing it to grow organically as the title progresses.

"The scope of games has changed so much since I started more than 13 years ago – you can't make a game with three of your friends in a basement anymore," Smedstad told *Develop*.

"For a new team to start up and take a full project on is a huge risk, and with the budgets for AAA games nowadays no publisher would risk that kind of investment.

"What working on the multiplayer portion of *Wolfenstein* has given us is a base in which to grow the company organically, in a genre we know very well. At the end of the project Activision will have gotten a top notch multiplayer game, and we will have grown from just a handful of guys to a full team."

"From day one we wanted to contribute back to the industry..."

Neil Postlethwaite, Endrant Studios

Explaining why the company has chosen to open in the UK despite tempting economic incentives elsewhere, Smedstad pointed largely to circumstance – a mix of the right people, the right partners and the right project – but also at the country's talent pool as a prime motivator.

"There is a lot of talent in the UK, and one of the main reasons we are located here is because of the talent pool available," said Smedstad. "Even with this advantage, there are many hurdles in starting an independent

studio in England. Starting from scratch within the UK a real challenge: everything from the high overhead cost compared to some states in the US and Canada, the strong pound to dollar ratio and many other factors."

It's with this experience of founding a start-up that has propelled the team into supporting the Games Up campaign, despite being such a small company.

"It's always been frustrating to see the UK games industry complain that no-one pays attention to its successes, while at the same time not contributing to organisations like Tiga and the Games Up campaign," said Postlethwaite. "When we started Endrant we decided that from day one we wanted to contribute and do something about it, rather than just sitting in the corner ranting to ourselves."

"It can do nothing but good as far as helping studios be competitive in the global market," added Smedstad. "This is doubly so for a start-up or smaller studio where the margins are much tighter and you don't have a war chest or other revenue streams coming in. We are going down a road where the UK government is not responding to what other development areas are doing, whether it's tax breaks or other support, which will drive the industry elsewhere."

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MIND YOUR OWN BUSINESS



by Nick Gibson

A view to subscribe to?

Last month we looked at the potential of advertising as a core or ancillary revenue stream for games companies. This month I want to turn our attention to the venerable subscription, a business model that Games Investor estimates will generate over \$2bn in the West this year.

Subscriptions have been established as a pillar of the hardcore online games market for well over a decade, although its substantial commercial potential was only really established with the 1997 release of *Ultima Online*. With run rate revenues of some \$2.5m per month at its peak, EA's seminal online role-playing game established a commercial precedent that almost the entire Western MMO market was to follow.

Subscriptions ultimately allow companies to more closely match their revenues with their ongoing costs and offer an upside potential far beyond any fire-and-forget boxed product sale. However, in doing so subscriptions also force companies to adopt a service provider approach for which the regular flow of new content, improvements and features, as well as the provision of an accessible and efficient customer service resource, are of paramount importance.

The subscription business model is highly momentum based. Many of a typical hardcore MMOs largest ongoing costs (such as bandwidth, hosting, marketing and customer support/community management) are theoretically variable, but in practice cannot easily be switched on and off, and certainly not without significant ramifications for the MMO's revenues. Measuring and predicting this cost momentum, combining it with the more 'fixed' billing, development and admin costs, and ensuring it all comes to below the forecast revenue level takes considerable skill and practice.

It is a precarious balancing act which many MMO companies have often got wrong. For some (most notably serial MMO cancellers EA and Microsoft) the prospect of building and maintaining this cost momentum has resulted in MMO projects being abandoned well into their development cycle and

sometimes even after they have been launched.

With a typical hardcore MMO customer lifetime value of some \$105 to \$145 over an eight to ten month subscription duration, the opportunity cost of losing a subscriber early can be huge. It is ironic therefore that the greatest level of churn for a typical MMO is within the first few months of a new player's subscription. In contrast,

"The opportunity cost of losing a subscriber early can be huge..."

many MMO companies report that after this period the rate of churn plummets. Others believe that this loyalty could be exploited to a far greater degree than the current \$10 to \$15 a month, with special premium-priced subscriptions offering exclusive, high perceived

value (but low comparative cost) content and services. Getting users over the difficult first few months is therefore a huge challenge. Ultimately it comes down to the quality of the game and in particular the community and service that surrounds it.

Subscriptions also represent one of the fastest growing segments of the casual online games business too. And once again it has taken EA to establish the commercial precedent from which the rest of the market is drawing inspiration. The growth of EA's Club Pogo subscriber numbers may have slowed significantly in the last 18 months (still an impressive 1.65 million at present) but the service remains the clear market leader in the casual online space generating the most revenue and providing the most sophisticated service.

In fact, Club Pogo has begun to display some of the traits of its MMO cousins: communications are at the heart of the service, 90 per cent of its subscribers have created and modified Club Pogo Minis (avatars) and 20 per cent have even paid additional sums to further embellish their profiles. Surprisingly, perhaps, this has been achieved with a

subscriber base that is around 70 per cent female and with 40 per cent over the age of 50.

Most of the larger casual online games publishers and portals now also offer a subscription alternative to buying titles on an individual basis, a proposition that has proven popular. This usually gives players either unlimited access to a selection of premium casual download games for the duration of the subscription or gives them discounts of 50 per cent or more on individual games in return for a minimum number of purchases by the player.

Conspicuous for their absence at this party are the consoles (Xbox Live Gold membership excepted). With a ready-made audience of gamers and established billing systems, it is almost shocking that there has not been more use of subscriptions on consoles to date. The subscription model has been proven to work with even casual online games, so the argument that subscription-based console games are too high risk does not fly. Given the commercial benefits of the model, we believe that it only a matter of time before the consoles start to catch up with the PC subscription market.

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VARIABLE DECLARATIONS



by Owain Bennallack

Will we fall in love with low fidelity games?

The march of media sometimes seems a long trudge upcountry from cave paintings and papyrus to the latest multiplex space opera. As movie posters and game reviews assure us, our entertainment experiences are ever richer and more realistic. Big isn't all that's better – better is better, too.

True, no self-respecting *Develop* contributor would decry the thrill of snazzier special effects. But were Charlie Chaplin to see Disney's *Wall-E*, he wouldn't spend too much time marvelling at the graphical step up from *Snow White and the Seven Dwarves* – he'd be too busy contacting his lawyers about all the inspirations lifted from the heyday of silent movies.

Things change, yet stay the same. Boy meets girl, one way or another.

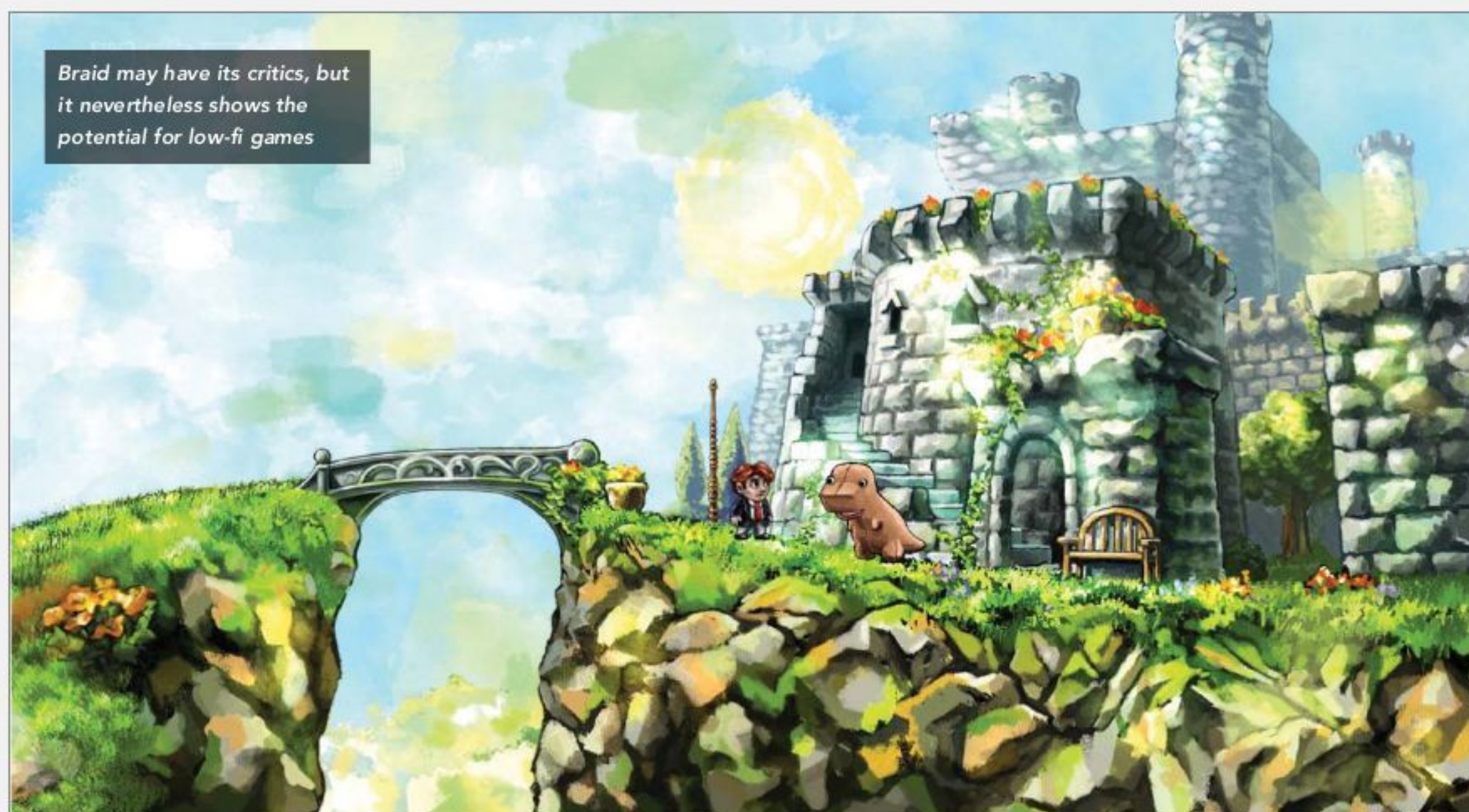
TECHNOLOGY TAKEAWAY

So far, so familiar: eye-candy alone doesn't cut it, on the big or small-screen. 15 years after CD-ROMs and 3D graphics first derailed games, we all know this.

Yet there's another strand to the interwoven evolution of technology and content that's less often appreciated: other technology-determined factors, such as convenience, novelty, and price, can trump even our love of high fidelity.

How important a badge is realism when the superior resolution of film has been tossed aside for mobile phone snaps? Sure, digital photography, especially at the high-end, has now caught up. But we are happy to then lose millions of pixels to put our images on Facebook. Who prints out high quality images today?

Or consider music. Once the hoi polloi had to go to church, the nearest capital city, or to war to hear anything but folk music. Cheap printing and mass manufacturing brought sheet music and instruments to the masses, followed by phonograms and radio broadcasts, and eventually LPs and CDs. Having already traded authenticity for convenience, fidelity also proved negotiable, as we've swapped CDs for lossy digital music, and professionally recorded albums for bedroom demos propagated on MySpace and YouTube. When it comes to pop, we're all punks now.



Braid may have its critics, but it nevertheless shows the potential for low-fi games

"If anything, *Braid* is too loved to be a work of art; Jonathan Blow hasn't provoked a Monet-style moment of critical revulsion..."

NEW WAVE GAMES

Video games have long withstood this counter-trend – indeed, critics have regularly complained a new hardware generation's top shooter is just a higher resolution *Space Invaders*.

When successive consoles had easy wins to plunder, such a development focus made sense – the fidelity gap between 1982's *Pitfall* and 1996's *Tomb Raider* being far more meaningful than between 1997's *Gran Turismo* and *GT5 Prologue*. Moreover, big budget game developments' arms race has developers fighting on every front: no good having a jittery frame rate but a great gameplay mechanic if your rival is silky smooth. Getting your millions back means ticking every box.

But after years of talk, change is in the air. One of the highest-rated games ever on Xbox 360 is Jonathan Blow's *Braid*, which might be summarized as *Mario* meets Tennyson's *Maud* via the *Shoot'Em-Up Construction Kit*. Not only is memory a feature of the gameplay and the narrative, the game winks at the medium's veterans like a Tarantino movie. The critics adore it, and gamers are buying it.

Are *Braid*'s homebrew credentials, 2D backdrops and brief longevity the future of games? No. But *Braid* does confirm an extra dimension to that future – room for art house games

where something other than graphical realism or gameplay underwrites the experience (narrative, social networking, or nostalgia, say).

Not everyone is convinced: Simon Byron called *Braid* over-rated in *Develop* two issues ago. However, Simon's column comes later in the magazine than mine, which signifies that, while funnier than me, his views aren't quite so valid. (It also means he's worse at games.)

More seriously, any game tiptoeing towards art is absolutely certain to garner a rotten reception somewhere. If anything, *Braid* is too loved to be a work of art; Jonathan Blow certainly hasn't provoked a Stravinsky or Monet-style moment of critical revulsion. *Myst* came closer to inspiring that reaction in the nineties – and indeed was closer to art (for what that's worth) than 99 per cent of games.

Vast quantities of rubbish will pass through unfiltered (and filtered) distribution channels like Xbox Live Arcade, Apple's App Store and even Facebook for every *Braid* or *Myst* that extends what games offer. But we've been on this march for 30,000 years, there's no rush.

Over time, we'll increasingly trade away better graphics and even gameplay for something different. Such games won't be better, or worse, necessarily. But they will be progress.

Owain Bennallack is executive editor of *Develop*. He edited the magazine from its launch until its February 2006 issue. He has also worked at MCV and Edge, and has provided consultancy and evaluation services to several leading developers and publishers. He is also chairman of the *Develop* conference advisory board.

DESIGN DOC



by The Alpenwolf

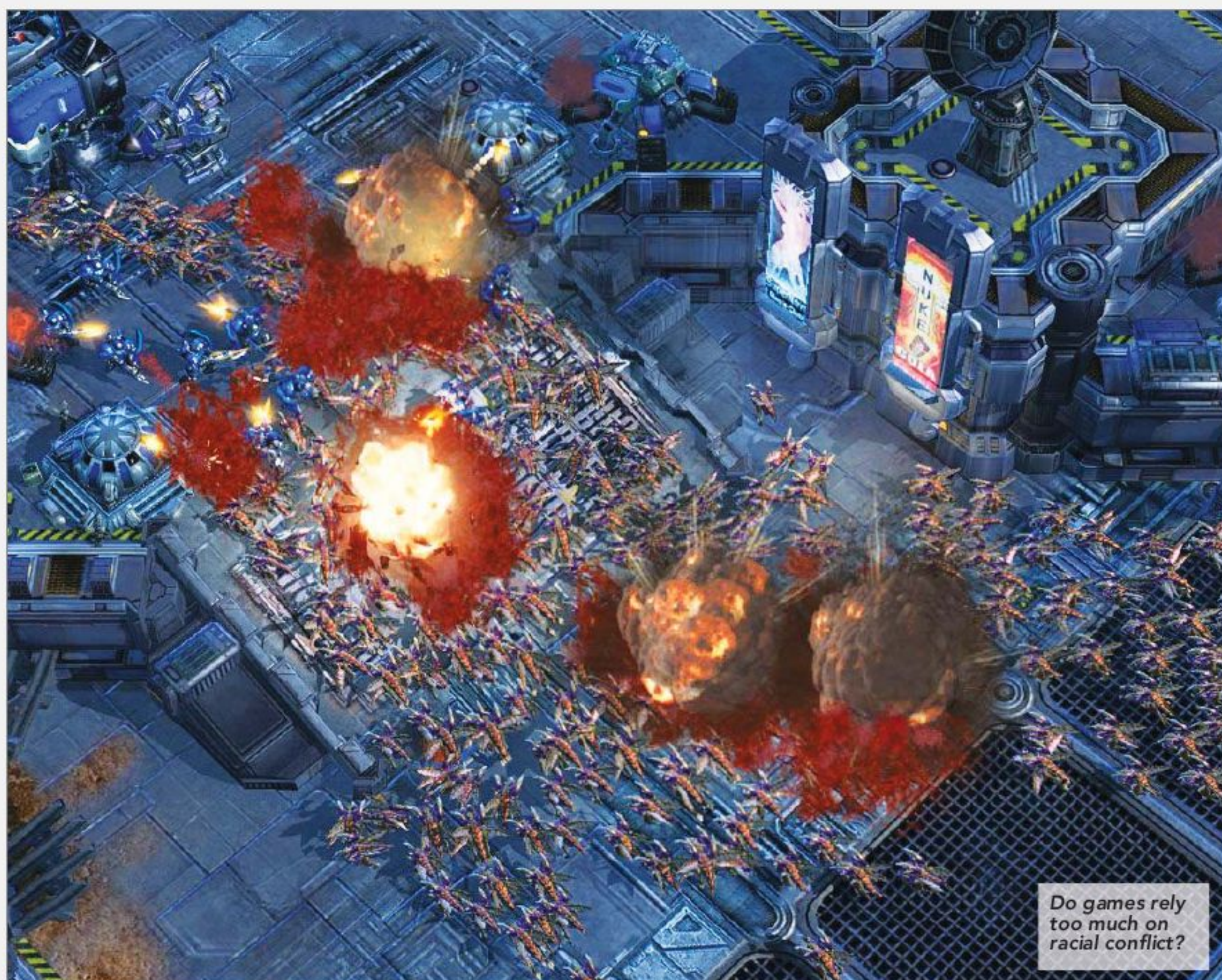
The Art of Conflict

There is a cognitive dissonance that pervades the game industry which, with a few notable exceptions, has been the case for the greater part of its history. While conflict is an inherent part of any game design that involves violence, competition, or war, for the most part this conflict is presented to the gamer as little more than an intrinsic assumption.

Dungeon Keeper was a remarkable game, not so much because it turned the concept of good guys vs. bad guys on its head, but because for the first time since an intrepid party of well-armed Dungeons & Dragons adventurers entered a dungeon, it offered a potential explanation for precisely why the prototypical Bad Guy was dwelling in the heart of his lair and what occupied him there. This was a brilliant step forward which unfortunately made less of an impression upon game designers than it perhaps should have.

Ironically, the industry has tended to go the other way, taking steps to avoid issues such as sex, religion, and politics despite the fact that these have been some of the primary conflict-generators throughout the history of the human race. For some strange reason, racial conflict has become the *de facto* accepted standard in gaming, although fictional races such as the Zerg and the Dark Elves are used and racial conflict has not historically been a major source of conflict when compared to the wars over ideology, economic resources, and religious differences over the years.

Religion, in particular, is considered a sensitive topic, which borders on the inexplicable considering that priests of one mythical god or another infest fantasy worlds like rats; especially in light of the way most fantasies take place in a setting that is recognizably based on the religion-dominated society of medieval Europe. But the very reasonable wish to avoid upsetting religious sensitivities should not preclude the use of Man's religious instincts to generate game conflict altogether; players can be given effective religious incentives that improve the gameplay experience and are no more readily



"Sexual elements – such as sexual rivalries – can be effectively mined for productive game conflict..."

confused with real-world religion than sci-fi 'credits' are mistaken for physical pound sterling.

The same is true for politics. Despite the fact that the political process can quite reasonably be described as a game, and a very complicated, involving game at that, the elements of actual partisan politics seldom make an appearance in games, even games that would be well-served by them. As even the most casual reader of Roman or

Byzantine history knows, acts of conspiracy against the ruler was not so much the exception as the rule; the plotlines of many games and the supposedly shocking nature of the secret conspiracies they reveal only serves to demonstrate the political naïveté of the game designers responsible.

Sex is perhaps a bit more problematic, given the fact that government authorities tend to be particularly sensitive about the potential nexus of adult entertainment and underage players. Also, it's not terribly hard to imagine a more realistic treatment of sex crossing the border from game into pornography, but even so, there are sexual elements – such as sexual rivalries – that can be effectively mined for productive game conflict without the need to enter into needlessly provocative and legally dangerous territory.

As the graphics in games have become ever more realistic and

sophisticated, it becomes increasingly obvious that other game elements simply have not kept pace. This is not necessarily a bad thing; escapism is an important aspect of entertainment, especially in these financially turbulent times. But is the player's desire to play a hero more satisfactory or less if the conflict in which he takes part is one that is convincing and emotionally credible? It should be obvious from the success of licensed sports games compared to unlicensed titles that the more realistic the conflict presented, the more satisfactory the game experience is to the player.

As John Romero once pointed out, triggering an emotional reaction from the player is the Holy Grail of game design. Therefore, the ambitious game designer should take pains to seek out every opportunity to trigger those reactions in his game; to assiduously avoid them instead is a foolish and counter-productive mistake.

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THE DEALS

SOCIAL CLIMBERS

The Game Creators have been awarded \$25,000 by Facebook's fbFund. Its app *Social Arcade*, a Facebook-exclusive application that lets users create their own 2D games using a simple drag-and-drop interface and then share those games with their friends, is currently in alpha.

www.thegamecreators.com

DYNAMICS PATHFINDING

Crystal Dynamics has licenced BabelFlux's NavPower for its latest title, *Tomb Raider: Underworld*. The pathfinding solution features dynamic path planning, integrated visual debugging and support for multi-core systems and streaming.

www.navpower.com

COCKPEAK INTERACTIVE?

SouthPeak Interactive has acquired Gamecock Media Group. The move sees the two fledgling publishers join forces, and means titles such as *Legendary* will be released under the SouthPeak label. Gamecock was founded a year and a half ago, emphasising the importance of independent developers.

www.southpeak.com

SI LETS OFF STEAM

Sports Interactive has signed up to use Valve's Steamworks service for its 2009 *Football Manager* games. The service will be used in both the retail versions of the game and the digital download versions.

www.steampowered.com

UNREAL GRASSHOPPERS

Grasshopper Manufacture has revealed that its forthcoming game for EA will be developed using Unreal Engine 3. The title, directed by Grasshopper CEO Suda 51 and produced by *Resident Evil* creator Shinji Mikami, is an action-horror title set for release on multiple platforms.

www.unrealtechnology.com

AUTO EMOTION

Emote Games has been given £600,000 in funding by the Technology Strategy Board to support a new artificial intelligence project, which will look to improve the quality of AI characters in social networks and online games. Emote will partner with Imperial College London for the research, starting in January 2009.

www.emotegames.co.uk

DEVELOPER CHART

(AUGUST 24th – SEPTEMBER 27th)

1



LAST MONTH 1

NINTENDO



BEST SELLING GAME:
WII FIT



Nintendo's reign continues unabated, and is pretty unlikely to go anywhere – especially as Christmas approaches and everyone starts to worry about all that extra weight they've piled on over the holidays. Expect sales to slow down when people realise it doesn't work if you do it sat on the sofa.

Wii

2

NEW

LAST MONTH -

LUCASARTS



BEST SELLING GAME:
STAR WARS: THE FORCE UNLEASHED



LucasArts must be over the moon – they've finally managed to make a *Star Wars* game that's not actually that bad. Still, it allegedly took them \$40 million to do so, meaning it'll have to continue to do pretty well in order to recoup that outlay.

XB360, PS3

3



LAST MONTH 13

MAXIS



BEST SELLING GAME:
THE SIMS 2: APARTMENT LIFE



Call me frugal, but I don't need a *Sims* expansion pack to tell me what apartment life is like: living in North London on a journalist's salary is doing that quite well already, thank you very much. Still, at least I can broaden my horizons with *The Sims 2: Maisonette Mayhem* and *Bungalo Boogaloo*.

PC

4

NEW

LAST MONTH -

PANDEMIC STUDIOS



BEST SELLING GAME:
MERCENARIES 2: WORLD IN FLAMES



One of our favourite news stories last month was that EA managed to cause gridlock mayhem in London by giving away free petrol to all in a marketing ploy for *Mercenaries 2*. Sadly they didn't make the experience authentic by glitching into the floor every few minutes, but a good effort anyway.

PS3, XB360, PC

5



LAST MONTH 17

EA TIBURON



BEST SELLING GAME:
TIGER WOODS PGA TOUR 09



Now that EA Tiburon isn't relying on *Madden* alone, its true potential is becoming apparent. Quite why you'd find people hitting tiny balls with sticks more entertaining than burly men jumping on each other is beyond us, but then we've always had peculiar tastes.

PS3, XB360

OUR MONTHLY RANKING OF THE WORLD'S STUDIOS BASED ON UK GAMES SALES

CHART KEY		UP
NEW	NEW ENTRY	DOWN
INDEPENDENT	NO MOVE	

6	↓	SEGA	Wii, DS	🇯🇵
	LAST MONTH 5	MARIO & SONIC AT THE OLYMPIC GAMES		
7	↑	EA SALT LAKE	Wii	🇺🇸
	LAST MONTH 71	TIGER WOODS PGA TOUR 09		
8	↓	NAMCO	XB360, PS3	🇯🇵
	LAST MONTH 2	SOULCALIBUR IV		
9	↑	KROME STUDIOS	PS2, Wii	🇦🇺
	LAST MONTH 93	STAR WARS: THE FORCE UNLEASHED		
10	↓	TRAVELLER'S TALES	PS3, PS2, PSP, Wii, DS, XB360, PC	🇬🇧
	LAST MONTH 6	LEGO INDIANA JONES: ORIG. ADVENTURES		
11	↑	MIDWAY	XB360, PS3, PS2	🇺🇸
	LAST MONTH 27	TNA IMPACT!		
12	↑	CAT DADDY	DS, Wii	🇺🇸
	LAST MONTH 20	CARNIVAL: FUNFAIR GAMES		
13	↓	VICARIOUS VISIONS	DS	🇺🇸
	LAST MONTH 4	GUITAR HERO: ON TOUR		
14	↓	INFINITY WARD	PS3, XB360, PC	🇺🇸
	LAST MONTH 11	CALL OF DUTY 4: MODERN WARFARE		
15	NEW	GEARBOX SOFTWARE	PS3, XB360	🇺🇸
	LAST MONTH -	BROTHERS IN ARMS: HELL'S HIGHWAY		
16	↓	EUROCOM ENTERTAINMENT	PS3, XB360, PC	🇬🇧
	LAST MONTH 3	BEIJING 2008		
17	↓	KONAMI DIGITAL ENT.	PS3, PS2, PSP, XB360, Wii, DS, PC	🇯🇵
	LAST MONTH 7	PRO EVOLUTION SOCCER 2008		
18	NEW	SILICON KNIGHTS	XB360	🇨🇦
	LAST MONTH -	TOO HUMAN		
19	↓	EA CANADA	PS3, PS2, PSP, XB360, Wii, PC	🇨🇦
	LAST MONTH 16	FIFA 08		
20	NEW	MYTHIC ENTERTAINMENT	PC	🇺🇸
	LAST MONTH -	WARHAMMER ONLINE: AGE OF RECKONING		

Chart Comment

Forgive us, but we're very excited this month: there's actually some change in the charts, and so that frantic scramble for something interesting to say – a scramble which usually results in a tenuous point and an irrelevant tasteless comment left on the cutting room floor at the last minute – is slightly more relaxed this month.

The key point this month is that, with the exception of Nintendo (of course), this month's top five studios are all fresh to the listing – with two of them even being new entries. Also interesting is to note that EA studios make up three of those five, and that they're all US-based.

Many of the studios towards the top end of the charts last month now find themselves towards the bottom: Vicarious

"EA studios make up three of the top five positions..."

Visions are down nine places while UK studio Eurocom sees biggest drop of 13 places as other sports take over that athletic interest that the Olympics inspired in everyone.

This month's big climbers are Midway, riding on the back of wrestling game *TNA Impact!*, EA Salt Lake and Cat Daddy – but the biggest climber is Australian studio Krome, whose work on the PS2 and Wii versions of *Star Wars: The Force Unleashed* sees it Force Push its way up 84 places to ninth position.

Lastly, mention should go to EA Mythic, whose impressive first-week sales for MMO *Warhammer Online* should kick-start that crucial long tail.



Ed Fear

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GREATBRITISHGAMES

Tomb Raider

In the last of our ten-part series evaluating Britsoft IPs, **Nick Gibson** casts his eye over the most iconic UK-born games property of all...



THE STATS

ESTIMATED TOTAL UNIT SALES:

Over 35 million (console and PC)

NUMBER OF ITERATIONS:

Nine across console/PC platforms plus numerous compilation, remake, enhanced, mobile and portable editions.



GAME RELEASE TIMELINE

- | | |
|---|---|
| 1993: Development started | 2003: <i>LC TR: The Angel of Darkness</i> |
| 1996: <i>Tomb Raider</i> | 2003: <i>LC TR: The Cradle of Life</i> (movie) released by Paramount |
| 1997: <i>Tomb Raider 2</i> | 2006: <i>LC TR: Legend</i> (Crystal Dynamics) |
| 1998: <i>Tomb Raider 3: Adventures of Lara Croft</i> | 2007: <i>LC TR: Anniversary</i> (Crystal Dynamics and Buzz Monkey Software) |
| 1999: <i>Tomb Raider 4: The Last Revelation</i> | 2008: <i>Tomb Raider: Underworld</i> (Crystal Dynamics and Buzz Monkey Software) |
| 2000: <i>Tomb Raider 5: Chronicles</i> | |
| 2001: <i>Lara Croft: Tomb Raider</i> (movie) released by Paramount | |

OWNERSHIP HISTORY

- | | |
|---|--|
| 1988: Core Design started by Jeremy Heath Smith. | Design to Crystal Dynamics. Jeremy Heath-Smith resigns to start a new studio |
| 1994: CentreGold acquires Core Design to consolidate finances of U.S. Gold, Core Design and CentreSoft | 2004: Eidos seeks acquirer following consistent poor trading |
| 1996: Eidos acquires CentreGold for £17.6m | 2005: SCi acquires Eidos for £74m |
| 1996: Sony Computer Entertainment (SCE) offers Eidos exclusivity arrangement for <i>Tomb Raider 2</i> through <i>Tomb Raider 4</i> | 2006: SCi sells Core Design assets and staff to Rebellion |
| 1998: Crystal Dynamics acquired by Eidos | 2007: Principal development responsibilities for <i>Tomb Raider: Anniversary</i> split between Crystal Dynamics and independent developer Buzz Monkey Software, a situation continued with <i>Tomb Raider: Underworld</i> |
| 2003: Responsibility for the development of <i>Tomb Raider: Legend</i> passed from Core | |

CREATOR: Toby Gard (first Tomb Raider) and Phil Campbell

Tomb Raider is a perfect example of a game whose IP hinges on public identity. And famously, the *Tomb Raider* as we know it today almost never was: when Core Design first began work on the title its principal character was male and the game was action-oriented – concepts which thankfully evolved in time into a ‘female Indiana Jones’ called ‘Lara Cruz’ who relied on athleticism and stealth, not shooting and killing (a position which gradually changed over the various iterations, slowly alienating some players, it should be noted).

Back in 1995, details about the game and its lead character were withheld until close to release, at which point the media was captivated by the character, her face appearing on covers of publications as varied as *The Face* to the *Financial Times*. Lara Croft, as she had finally been renamed, quickly and notoriously achieved iconic status. The controversial combination of Lara’s hard-hitting femininity (some say it was appealing to female gamers) and pneumatic figure (most say it was appealing to teenage males) simply fuelled interest, guaranteeing coverage to this day.

The game went through a number of iterations, with varying degrees of success in sales. *Tomb Raider 2* represented the sales peak with over seven million unit sales, partly helped by a deal with Sony to keep *Tomb Raider* on the PlayStation to the exclusion of other platforms. The deal was one of the first major platform exclusives for an independent IP and Sony believes the deal contributed significantly to its hardware sales both in the USA and Europe. The deal terms were never made public, but they are understood to have comprised a substantial advertising ‘contribution’ and co-marketing benefits (at point of sale as well as on multiple media).

Despite Sony exclusivity, the third and fourth *Tomb Raider* titles failed to match the success of the first two but still managed in excess of 3.5 million units each. *Tomb Raider Chronicles* (the fifth title) arrived in 2000 as the PlayStation market had begun to decline, and

received only a lukewarm critical reception – but still managed sales in excess of three million.

The sixth game, *Lara Croft Tomb Raider: The Angel of Darkness*, proved particularly problematic because the technology transition between console generations. The end result was a late, buggy game that was critically mauled. Although Eidos had initially shipped 2.3m units, sell-through was slow and the actual revenue generated failed to meet the company's sales expectations.

Stung by the potential death of its most valuable IP, Eidos radically passed the development of the next game from the Core Design team to Eidos' Crystal Dynamics studio in California. Under first the Eidos management, and then the SCi management, Crystal was given the time to perfect the technology and gameplay experience. SCi also re-hired Toby Gard, the original *Tomb Raider* designer, to work with Crystal Dynamics, a role which he has continued since. The game has since returned to its roots, met with favourable reviews and, crucially, sold well. Subsequent titles *Lara Croft Tomb Raider: Anniversary* (a remake of the original *Tomb Raider*) and *Tomb Raider: Underworld* have both followed similar design and development tracks with few changes to the tried and tested gameplay.

Crystal Dynamics has remained the lead developer since 2003, although SCi's broad platform focus has necessitated the use of independent US developer Buzz Monkey Software, plus a small number of other third party developers for porting.

COMPANY INCEPTION AND GROWTH

Core Design was founded in 1988 as a games developer and made a name for itself creating original titles (such as *Rick Dangerous*) and, in the mid 90s, technically innovative titles for various Sega consoles (most notably SegaCD's *Thunderhawk*). By this stage, Core had begun to self-publish some of its products and its success was recognised by rapidly expanding publishing and distribution group CentreGold who acquired the company in 1994.

CentreGold was acquired for £17.6m by newly listed Eidos, which quickly disposed of the distribution business and integrated all of the development and publishing parts – except for Core, which it granted autonomy.

At the time of *Tomb Raider*'s launch, Eidos was just a small (albeit comparatively well capitalised) company that had only been operating in the games sector for less than a year, but strong reviews helped the first game sell in significant volume. The franchise became the principal driver of Eidos' remarkable four-year ascent during which over a dozen additional companies were acquired or invested in. However, by the start of the 2000s, Eidos' management of internal and, in particular, external studios had started to become loose and inefficient, with a blank cheque mentality that played havoc with the company's profitability. The introduction of new management at the top of Eidos brought a degree of respite and the company initiated a major cost reduction programme to improve its dwindling efficiency.

Unfortunately, this initiative failed to curtail the mounting problems being experienced with the development of the sixth *Tomb Raider* game, *Angel of Darkness*. Despite a massive development team, the project was beset by technical problems, the design focus was diffuse and the development cycle ran to well over three years. The title was finally released

in 2003 following several much-publicised delays, and shipped with numerous technical and gameplay problems. Sales of the game were unsurprisingly weaker than expected, and contributed to its financial underperformance. This ultimately led to the Eidos board's decision to seek a sale of the company.

The purchase of Eidos by its smaller rival SCi, and the subsequent integration of its more successful approach to publishing management (a stronger emphasis on tight financial controls and a focus on execution) saw wide ranging changes. The underperforming team from Core was sold to Rebellion and *Tomb Raider* itself has returned to strong financial performance with the 2006 release of *Tomb Raider Legend*.

SCi's fortunes did not last, however, and a succession of poor results since, a failed attempt to sell the company and increasing shareholder discord forced the departure of the SCi founder and CEO, Jane Cavanagh, and her senior management team. It also precipitated a radical restructuring of the business that resulted in the axing of numerous development projects and teams. With a new management team and a healthier balance sheet SCi is now focused on exploiting a smaller number of 'pillar' IPs, of which *Tomb Raider* is arguably the most important. Whilst *Lara Croft Tomb Raider: Anniversary* achieved only around 1m unit sales, much is expected of imminent release *Underworld* whose performance could prove crucial to SCi's fortunes.

"In its 11 year history Tomb Raider has proven to be a pivotal IP for every company that has owned it..."

A unique aspect to this particular IP is its commercial exploitation outside of games. When Paramount had initially approached Eidos for the movie rights, there had been no successful game to movie transfer. Eidos' management, however, underestimated the potential for Paramount's dramatisation of its IP and secured what is estimated to have been only a low level, \$1m to \$2m fee per movie, including a complicated, limited royalty deal.

A slightly better deal is thought to have been renegotiated for the second film, after the success of the first (which grossed \$275m at the box office), but the second film flopped ('only' managing \$156m in box office receipts) leading to an acrimonious dispute between Paramount and Eidos. In negotiating the original film deal, Eidos' management were much more concerned with protecting their brand from being mangled by Hollywood, and strove to retain final approval rights for the script and the casting of all *Tomb Raider* films.

ANALYSIS

In its 11 year history *Tomb Raider* has proven to be a pivotal IP for every company that has



owned it. In Eidos' case, it single-handedly transformed the company from being a small regional publisher into an international player, but equally contributed to the company's downfall and eventual sale. In this regard, it has demonstrated IP's ability to be a double-edged sword. The UK industry's history is littered with examples where a developer has gone under or been acquired in distressed sales while trying to bring out sequels to best-selling franchises that have over-run budgets, schedules or its internal team's production capabilities. This reflects a whole host of endemic problems in the UK development community but primarily a lack of management experience in companies struggling to manage growth after a major hit game.

That the *Tomb Raider* franchise bounced back, after the critical savaging and relative commercial failure of the sixth game and the transfer of the franchise to an entirely new studio, is a testament to the resilience of the underlying IP and the ability of its new developers. The resurrection of a brand many feared damaged is an almost unique achievement in the industry.

Despite striking numerous lucrative merchandising deals for *Tomb Raider* and *Lara Croft*, Eidos failed to demonstrate this shrewdness with the IP's biggest spin-off, the films. Combined they made over \$400m in global box office sales (the biggest game-to-film success the industry has seen) and an unknown level of DVD, video and other film merchandising sales. Eidos is not thought to have generated more than \$20m from them in total. With over 10m units sold by the time the movie was green lit, Eidos could undoubtedly have been justified in securing a greater proportion of the film's receipts. However, this is far from an easy deal to negotiate – Microsoft's attempts to extract a material percentage of box office receipts from a proposed movie based on its *Halo* franchise attributed to that project's failure to secure funding.

The *Tomb Raider* IP has changed hands several times. It is still a critical IP for SCi, but attempts by the company to diversify its portfolio to be less reliant on the franchise have met with mixed success and undoubtedly contributed to the recent financial problems at the company. *Tomb Raider* is, however, the strongest IP to remain in the hands of a UK company – although SCi, having attempted to sell itself in 2007, may well still change hands in the short to medium term. Since there are no potential acquirers of scale in the UK, any purchaser (Time Warner with a 19 per cent stake would appear the most likely candidate) is unlikely to be a UK-based company. Once again, UK IP ownership may change hands to a larger US or possibly European company.



Games Investor Consulting is a specialist games industry consultancy founded in 2003 to provide independent games research and corporate finance consulting to the games industry and financial community. Headed by Rick Gibson and Nick Gibson, GIC is one of the industry's most trusted sources for market intelligence, has generated a number of industry-standard reports, and has consulted on games strategy and research for numerous games and media companies as well as trade and governmental bodies.



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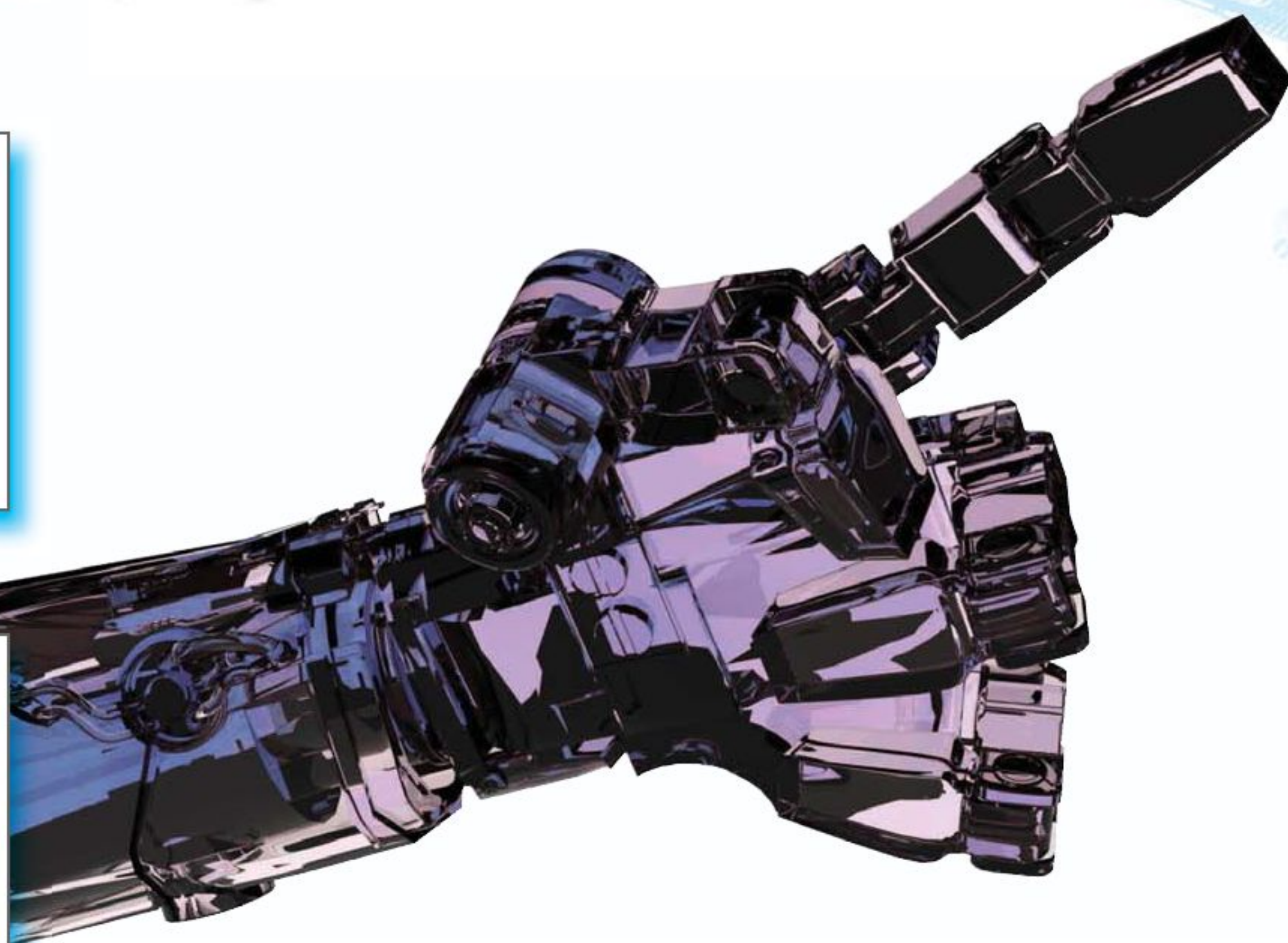
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FRENCH R

EARLIER THIS YEAR, Ubisoft opened its 20th studio – in Brazil – while at the same time continuing to grow one of its first studios, the busy 2,000-man operation in Montreal, Canada. **Michael French** spoke to the firm's executive director of worldwide studios Christine Burgess-Quemard to find out more about the impressive growth of the publisher's development resource...

Develop: *What major lessons have you learnt from the expansion of Ubisoft's development business?*

Christine Burgess-Quemard: It takes time – a lot of it! And whether it's your first or your twentieth studio, each time it's a challenge. When we open a new studio, we always ensure that we go into places that have a large, highly educated talent pool and, in the end, each new studio brings a fresh group of young, motivated talents that are eager to learn and put their skills to work. It reminds all of us that creative people are the heart and soul of our industry, and our consistent expansion has ensured that we've never forgotten that it's the talents that are the key.

That's why our current challenge is not only to continue to seek out new talent, but to move beyond the typical recruitment process. With all of our titles, especially in the Games For Everyone line, we need to ensure that we are thinking differently about the gameplay process, and creating games that are intuitive to play. By infusing a development team with non-traditional profiles who don't come from a typical games development background, we

market is changing and we need to change with it. The industry has become increasingly international in the past few years, so it only seems natural that development teams reflect that.

Even more importantly, video games have often been made by gamers for gamers, and now that video games are being adopted by more non-traditional audiences, we need to ensure that we have non-traditional people creating those games. It's a real challenge for us because these people don't spontaneously think of video game development as a career option, so we need to be creative about going out and finding them since they don't necessarily come and find us. They could have experience in the music industry, in industrial design, or anything where they have to take great but complex technical ideas and make them easy and fun for people to use.

For example, we're looking for creative profiles that have worked on toys, ad campaigns, video clips or web services. The more we can get people behind the scenes who understand or have similar profiles to these new gamers, the more we can make games that speak to this new audience.

EVOLUTIONARY

can think differently about creating and about playing, and bring our games even closer to our consumer.

D: *With new studios in Brazil, India and Africa, Ubisoft's emergent market strategy is clearly important. How will it evolve further?*

CBQ: Ubisoft is always on the look-out for opportunities to expand our studios and to move into untapped areas of creativity. But what is really important is that each new recruit – whether in a new studio or a more established studio – brings to us their own background, experience and culture. The video game

D: *Ubisoft has garnered a reputation for itself as keenly pursuing emergent markets of late (Sony's Shuhei Yoshida specifically told me he was 'amazed' at the activity). How important amongst the industry is it that you prove there are new markets out there?*

CBQ: Actually, we don't feel we have anything to prove in the industry. We were the first developer to open a studio in places like Romania or Shanghai, and the industry has followed us. But our strategy is about what works best for Ubisoft, and what has proved to help us succeed. And that means growing organically in areas that have



good infrastructure, and a promising educated talent pool. It may take us longer to get up and running as there is obviously a lot of training to do, but the end result is worth it.

When we created our studio in Romania, I'm not sure that we could have predicted that they would be so adept at making air combat games. Each new development studio we open brings its own personality and its own culture to Ubisoft and that culture gets shared throughout all of our studios, since we encourage mobility and knowledge sharing across all studio locations.

D: How important are government subsidies for how you expand the Ubisoft studios? Are you prepared for what could happen if that support was to disappear?

"We don't feel we have anything to prove to the industry. We were the first developer to open in places like Romania and Shanghai, and the industry has followed us."



CBQ: The most important element for us is talent. We go where the talent is. But an environment with a competitive advantage allows us to invest more, and more quickly.

We work hand-in-hand with local governments and, although we have to be prepared for the possibility of doing business without tax credits, I think it's quite clear that they create a win-win situation for both business and government – and ultimately the industry as a whole.

D: Are there any universal elements/rules you abide to when opening a new studio? (eg. Each studio must do X, Y, Z, etc.) Or is each one different?

CBQ: The keys are infrastructure, education, creativity and competitive

costs. If we feel that a city or region has those four factors in place then we can consider expansion there.

After that, we look to simultaneously recruit local talent while also bringing in experienced Ubisoft creators so that they can share their knowledge and train individuals at the studio. Each studio brings something new to the group, and that is exactly what we are looking for.

We encourage mobility so you find rather quickly that each Ubisoft studio infuses some of its talent, creativity and culture into other Ubisoft studios. It's our strength and our corporate culture at Ubisoft.

And people don't need to stay for a lifetime – even short-term missions to other studios means that there is a constant cross-pollination of talent and culture.

TALENT SHOW

ASK BURGESS-QUEMARD to choose an instance of how the firm has expanded its talent base and she is spoilt for choice – but one good example is Ubisoft Quebec's Guy Lampron, who joined the studio when it was looking for someone who could infuse their production process with a more cinematic sensibility

Lampron is an established writer/director of films and advertising, and his previous projects include directing the cinematics for Atari's *Act of War* – one of the rare cinematics for a video game that was entirely shot in live action – as well as having written and directed the computer animated short film *Sentinelles*, which won numerous festival awards and was shown in cinemas before the films *Chocolat* and *Memento* in Canada.

When Ubisoft proposed a job at its Quebec studio, Guy tells us he was intrigued, as he has some friends who worked in the industry already. He also says that he felt that he had seen most of what could be seen in the advertising industry, and had recently begun to play video games.

"Working in video games is especially exciting right now," says Lampron. "Video games are at a unique crossroads with the cinema. Storytelling in video games has come a long way in a very short time and is expected to become even more organic,



LAMPRON: Has joined Ubisoft Quebec from the movie industry

more rich from a narrative point-of-view, and more involving for the player than passively taking in a film. I look forward to being part of this next thrilling generation of games."

At Ubisoft, Lampron enjoys important responsibilities and continues to express his creativity in the concept phase of game creation. He will write and direct cinematics, but he will also be

"Video games are at a unique crossroads with the cinema"

called upon to study the way gamers use the in-game camera with the goal of proposing different ways for gamers to manipulate the camera and also help make the storytelling process more interesting, organic and fun. He's currently working on founding a creative department that will offer different visual services to the development teams as well as working on projects like filming tutorials for an upcoming unannounced game. And, he adds, he still gets to express his creativity with his work on directing and writing film projects in his off hours.

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Is Vancouver the Hollywood of games?



Radical's audio guru **Rob Bridgett** offers up a unique perspective on how Vancouver has built its talent base...

Vancouver has often been described as the Hollywood of the video games industry, and nowhere is that more evident than in audio for games.

Having said that, Vancouver has always had a small-town feel and the audio community here in Vancouver is beginning to feel similarly small and tightly knit, everyone seems to know each other in some way or another: whether they have worked together in the past or from meeting at industry events and conferences. There is good reason for this community feeling. Vancouver is home to well over 45 game developers, mostly centered in the downtown core, and they all rely on the talented and diverse audio staff working on their dev teams.

What is interesting and unique here is that the industry has a combination of world-class in-house audio studios, mid-sized studios and a growing number of innovative smaller boutique studios. Perhaps the two biggest studios in town are EA Canada (with over 30 audio rooms and upwards of 30 full-time audio staff) EA Blackbox, (home to the *Need for Speed* and *Skate* franchises with seventeen 5.1 audio rooms, a mix studio and one large common audio room) and Radical Entertainment, Vancouver's Activision Blizzard studio, which maintains a dedicated THX-approved 7.1 mix room, voice over recording studio and six 5.1 audio rooms and is currently the development home to *Prototype*.

Among the many other mid-large sized companies who dedicate considerable resources to in-house audio is Propaganda, Disney Interactive's Vancouver studio (*Turok*). They have sizeable in-house audio facilities and also rely on local and US recording studios for outsourcing much of the VO recording and final mixing - with other notable audio-savvy studios such as Relic, and Rockstar Vancouver.

Big industry talent also easily migrates to the boutique studios such as Hothead Games, whose audio director, Adam Gejdos, left Radical Entertainment in 2005 to join the start-up company who are now responsible for the critically and commercially acclaimed *Penny Arcade* games.

Over the past five to ten years a number of experienced audio directors have been imported from the US and Europe to work here (at Radical alone there is a significant UK

contingent), as there wasn't the experience here in Vancouver five or so years ago to keep up the demand at a time when the industry was massively expanding. Now the landscape has solidified somewhat with a wealth of international audio experience living and working here. Not only that, but there is a lot to be said for the up and coming local homegrown audio talent. Vancouver Film School and the Art Institute of Vancouver are both running dedicated video game audio courses both fostering close vocational ties to the industry here. EA Blackbox relies heavily on the VFS Sound Design graduates for their full-time paid internships within the audio department. There are very few places where there is such a hotbed of talent and the educational grass roots to support it all - and all in one city.

A great many freelancers and outsourcing studios also flock to Vancouver to benefit from the glut of game audio work here, such as Sharpe Sound who regularly take on video game audio duties among their slew of motion picture post-production work. Vancouver has very strong ties with Hollywood itself, with Los Angeles being only a two and a half hour flight away; similarly with the sound production talents in San Francisco and Marin County such as Skywalker Ranch - and importantly all on the same time zone. Having easy access to world class acting talent, composition and sound design and mixing talent via these geographical connections contribute to making Vancouver a perfect storm for game audio production. Some of the other geographical benefits are that in terms of gathering and maintaining unique sound effects in the games developed here: Vancouver is a city uniquely situated for audio field recording, with the ocean play areas, mountains, and true Canadian wilderness only a few hours drive away. Because of this, all manner of sound effects recording sessions, such as weapons, rockslides, boats, planes, and cars can be coordinated without having to leave the province.

For a city that is only 122 years old, it continues to develop rapidly as a hot spot for video game audio development, and with GDC and other video game centric conferences now flocking here, the future looks bright for further evolution of the audio community within the city.

"The future looks bright for the further evolution of the games community within Vancouver..."

Canada's gameplan

Highlights from the country's ascent to a leading place in development

- 1985:** Virtual Prototypes founded (later rebranded Engenuity)
- 1986:** Softimage founded in Montreal
- 1989:** Distinctive Software formed in Vancouver
- 1991:** Radical Entertainment founded in Vancouver
EA acquires Distinctive for \$11m, creating EA Canada
- 1992:** Megatoon founded in Montreal
- 1993:** Digital Extremes founded in London, Ontario
- 1994:** MMI opens in Montreal
Microsoft buys Softimage
- 1995:** Bioware founded in Edmonton, Alberta
- 1996:** Barking Dog Studios founded in Vancouver
Publisher DreamCatcher formed in Toronto
Behaviour is formed following Megatoon/MMI merger
Local government in Quebec introduces first tax credit
- 1997:** Relic Entertainment founded in Vancouver
Ubisoft opens Montreal development office
- 1998:** Avid buys Softimage from Microsoft
QA company Bug Tracker founded in Montreal
Online game tool firm Quazal opens in Montreal
- 1999:** Rockstar opens Rockstar Canada in Toronto
DC Studios opens in Montreal
French publisher Microids opens a studio in Montreal
Publisher Hip Interactive founded in Toronto
Autodesk forms its Montreal-based Media division via the acquisition of Discreet
- 2000:** Beenox founded in Quebec City
Gameloft opens Montreal office
HB Studios formed in Nova Scotia
- 2001:** Swedish studio DICE buys Ontario-based Sandbox
Digital Extremes opens Toronto studio called Brainbox
- 2002:** EA acquires Black Box and incorporates it into EA Canada
Rockstar buys Barking Dog, creating Rockstar Vancouver
Humagade founded in Quebec City
- 2004:** Relic acquired by THQ for \$10m
EA opens Montreal studio
- 2005:** Radical acquired by Vivendi Games
Japanese publisher Koei opens Toronto studio
EA Black Box moves into new office in downtown Vancouver
Ubisoft incorporates MC2-Microids into its Montreal studio
Financial difficulties force Hip to close
Bioware merges with Californian Pandemic
Activision acquires Quebec City's Beenox
Ubisoft opens studio in Quebec City
Babel Media opens QA outfit in Montreal
Disney opens Vancouver-based studio
- 2006:** JoWooD acquires Canadian publisher DreamCatcher
EA buys Digital Illusions, closes DICE Canada
Foundation 9 opens Backbone Charlottetown
- 2007:** Eidos announces plans to open a new studio in Montreal
Former Relic vets form Smoking Gun
PopCap buys Vancouver team SpinTop
Mobile developer Javagrounds opens Montreal office
EA buys Bioware-Pandemic
IPO and Other Ocean rebrand for Backbone Charlottetown
- 2008:** Autodesk announces plans to acquire Softimage
Casual games firm Big Fish opens Vancouver studio
New studio Trapdoor opens in Montreal
State of Ontario enhances tax credits for developers
Ontario also unveils new \$1.5bn games investment fund



EVENTS

There's no shortage of big-scale networking events in Canada...



Montreal International Game Summit

When: November 18th - 19th

Where: Palais de Congres, Montreal

Now in its fifth year, the Montreal International Game Summit has established itself as the main event in terms of Canadian games development conferences. Over 1,500 are expected to attend in 2008 – a number that has grown steadily since the first event in 2003.

This year, the event has attracted a number of international speakers for keynotes, including the UK's own David Braben, Warren Spector (whose Junction Point Studios is now owned by Disney), Braid designer Jonathan

Blow, Microsoft Game Studios executive producer Laura Fryer and representatives from the Center for Mental Health and Media, Massachusetts General Hospital.

Other key sessions will look at things like agile development, lighting in games, and outsourcing, while lectures dedicated to locally-produced games like Ubisoft's *Prince of Persia* and *Far Cry 2*, plus EA's *Boogie* are also planned.

Running alongside the conference is a dedicated expo area, plus a business lounge for attendees to set up meetings at.

www.sijm.ca/en

The ELAN Awards

When: February 28th

Where: The Centre in Vancouver for Performing Arts, Vancouver

The ELANs have been running for two years and is a big-scale awards event dedicated to the video games, animation and visual effects industries in Canada.

There are 39 - count 'em - awards up for grabs, 12 for each category and then a student prize for each category too. Awards include game of the year, best sound in a game production, and best game design, plus a publicly-voted gamer's choice prize.

And after two years of the event being open just to Canadian companies, for next year's event submissions are open to companies from around the world.

For more information head to

www.theelans.com

GDC Canada

When: May 2009

Where: TBC



Canada will get its own Games Developers Conference event next year, which comes as part of the expansion and rebranding of the Vancouver International Game Summit.

Very little is known so far however, except that it takes place in May and will "feature global perspectives on the key issues facing Canadian developers".

www.gdc-canada.com

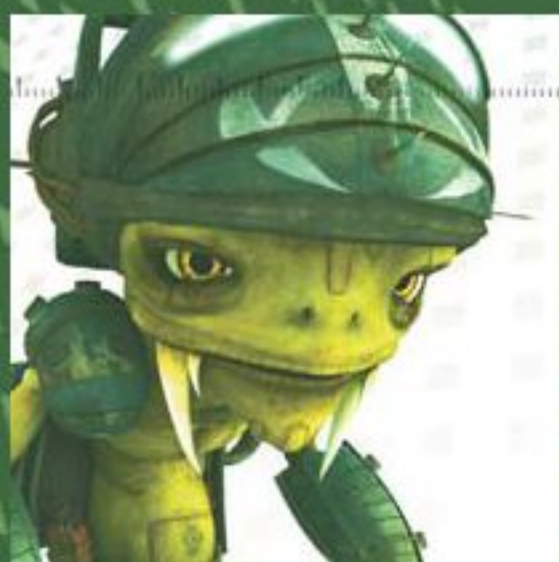
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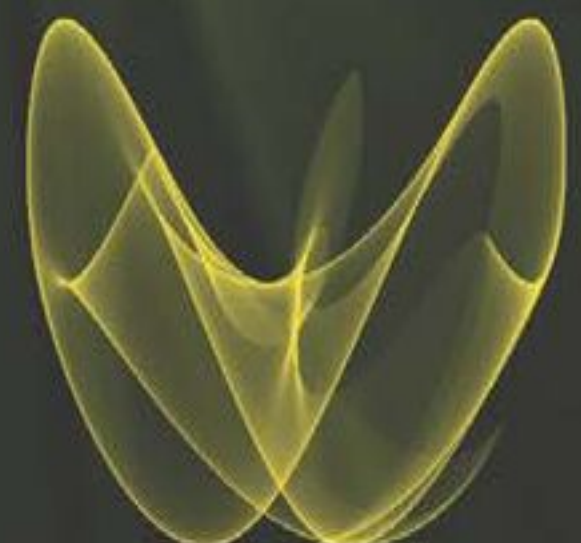
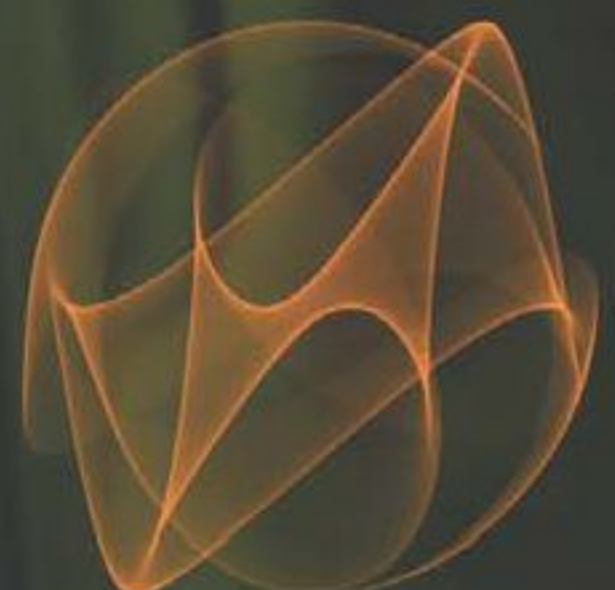
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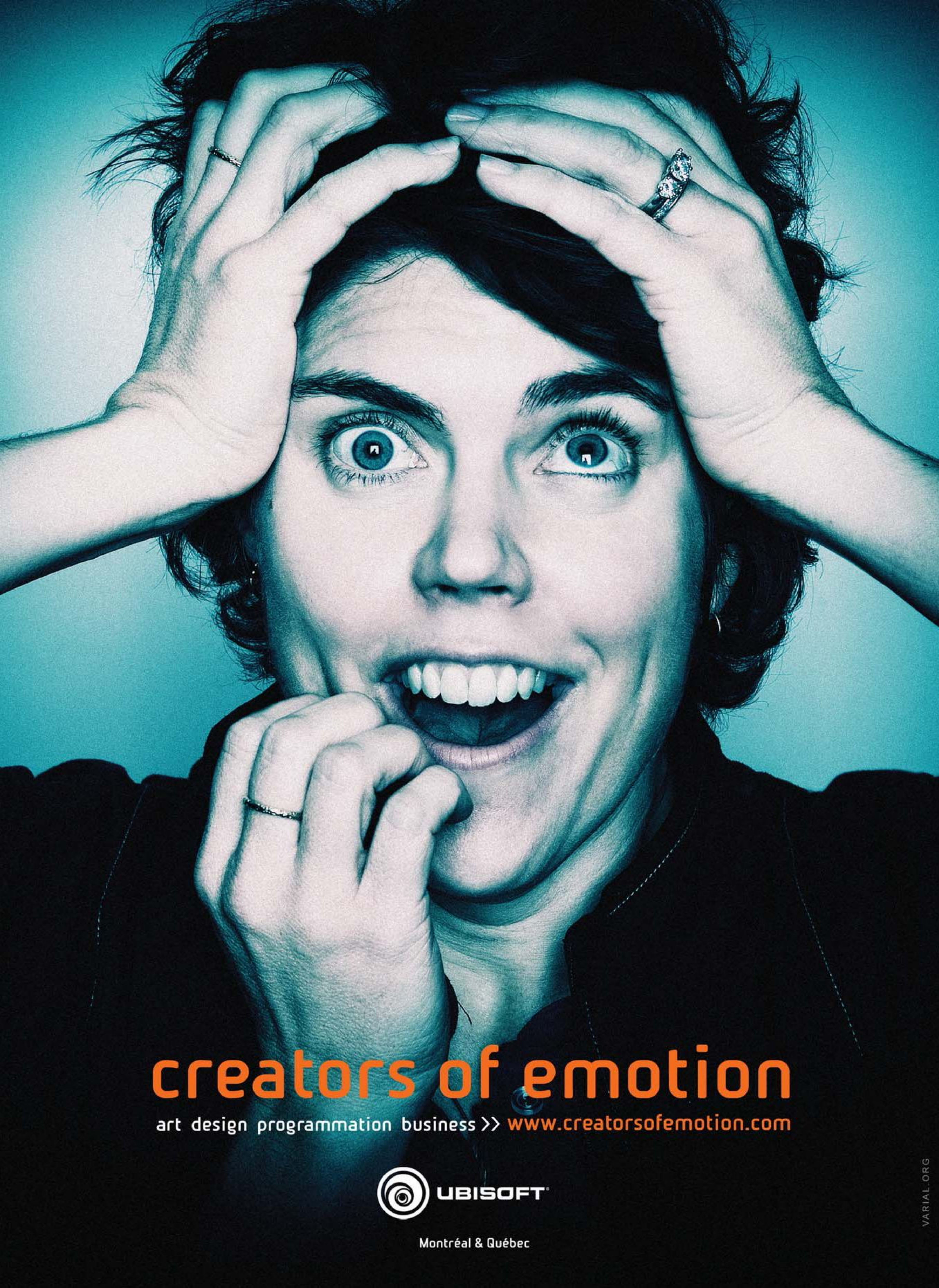
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CANADA

< FACTFILE >

Founded: 1997**Location:** Montreal, Canada**Number of staff:** 1,800**Current projects:** *Far Cry 2*, *Prince of Persia*, *Tom Clancy's Splinter Cell Conviction* and *NARUTO: The Broken Bond***Previous projects:** *Tom Clancy's Rainbow Six Vegas*, *Prince of Persia Sands of Time Trilogy*, *Tom Clancy's Splinter Cell* and many others**Key personnel:** Yannis Mallat (CEO, Ubisoft Montréal)

EASILY THE BIGGEST studio in the world, Ubisoft's Montreal office is the paragon of the tax credit system. Employing 2,000 people in the Quebec province – with plans to bump that to 3,000 within the next five years – its Montreal base is responsible for some of the biggest games around, including *Assassin's Creed* and *Prince of Persia*.

It's also the centre of Ubisoft's push

into other media – Ubisoft Digital Arts is an 80-man team set up to produce short CGI films and other media based on its game properties, and it recently acquired another 80-man VFX team, Hybride, which will help leverage the firm's brands in the film industry and share VFX technology with its game teams.

The French giant has been vocal in its

insistence that its growth in the region would not have been possible without Government intervention, calling on other governments to follow suit.

"We have been investing and developing in a specific business environment over the past 11 years, an environment that has helped Ubisoft develop a good balance to create quality games at a reasonable cost,"

says Cedric Orvoine, Ubisoft Montreal's director of communications. He's keen to point out, though, that the incentives are needed not just to help start-ups but to maintain growth in the area.

"This balance we have right now is at the core of our structure. So if the tax credit programme were to go away, it would certainly have an impact on the industry, it is pure math – but tax credit or no tax credit, the talent in the province means that the video game industry is here for the long haul."

Where the company thinks further work is needed is in education, a view shared by many of its contemporaries. "There is a lot of work to do in the training department," says Orvoine. "To support the growth of the local industry, we do need more people graduating from universities and colleges. We need to continue developing partnerships with the institutions in Quebec and in Canada and develop programmes that fit our needs."

BABEL MONTREAL

THE SUCCESS OF Babel Montreal is a classic example of how companies that have expanded to Canada have flourished and prospered thanks to the Quebec region's tax breaks.

Babel's track record is fairly well known across the industry as the first to pioneer outsourced specialists services, but a brief history of its successes are worth bearing in mind. In under a decade the firm has spread to multiple sites, with the Montreal team opening in June '05. The Canadian team specifically proved so successful so early that it was working on its first project three weeks after opening. It hit a staff count of 80 testers within six months, and had reached a headcount milestone of over 200 this summer. The firm is now taking up more space in the giant facility it currently occupies, the third expansion of its office, so it can house over 400 staff.

The scale of the operation is matched only by its contacts book, and



one of the key reasons the firm has grown so steadily has been the keenness of staff to work with big publishers on some of the biggest triple-A titles.

Adds Keith Russell, sales and marketing director: "A substantial number of our employees have been with the company for a number of years as Babel has historically been very good at providing internal promotional prospects. As the company provides a wide variety of different test services, staff have opportunities to broaden

their skill sets and become qualified across different domains. Babel has also grown very quickly in Montreal, and people see the company as having a bright future, spurred on recently by becoming part of the Quattro group. Staff get to work in an historic Montreal building, providing a pleasant working environment and Babel have the advantage in Montreal of being able to recruit teams of like-minded people all passionate about the industry."

Russell is also frank when it comes to the assertion that the Canadian games sector, especially in Montreal, might have a weakspot given the number of companies in the area that are operated by non-Canadian companies. "I disagree. By having lots of games companies in Montreal there is a good recruitment base, there are opportunities for people to grow into new roles at new companies, and it is recognised as being a serious industry. Whenever I get stopped at passport

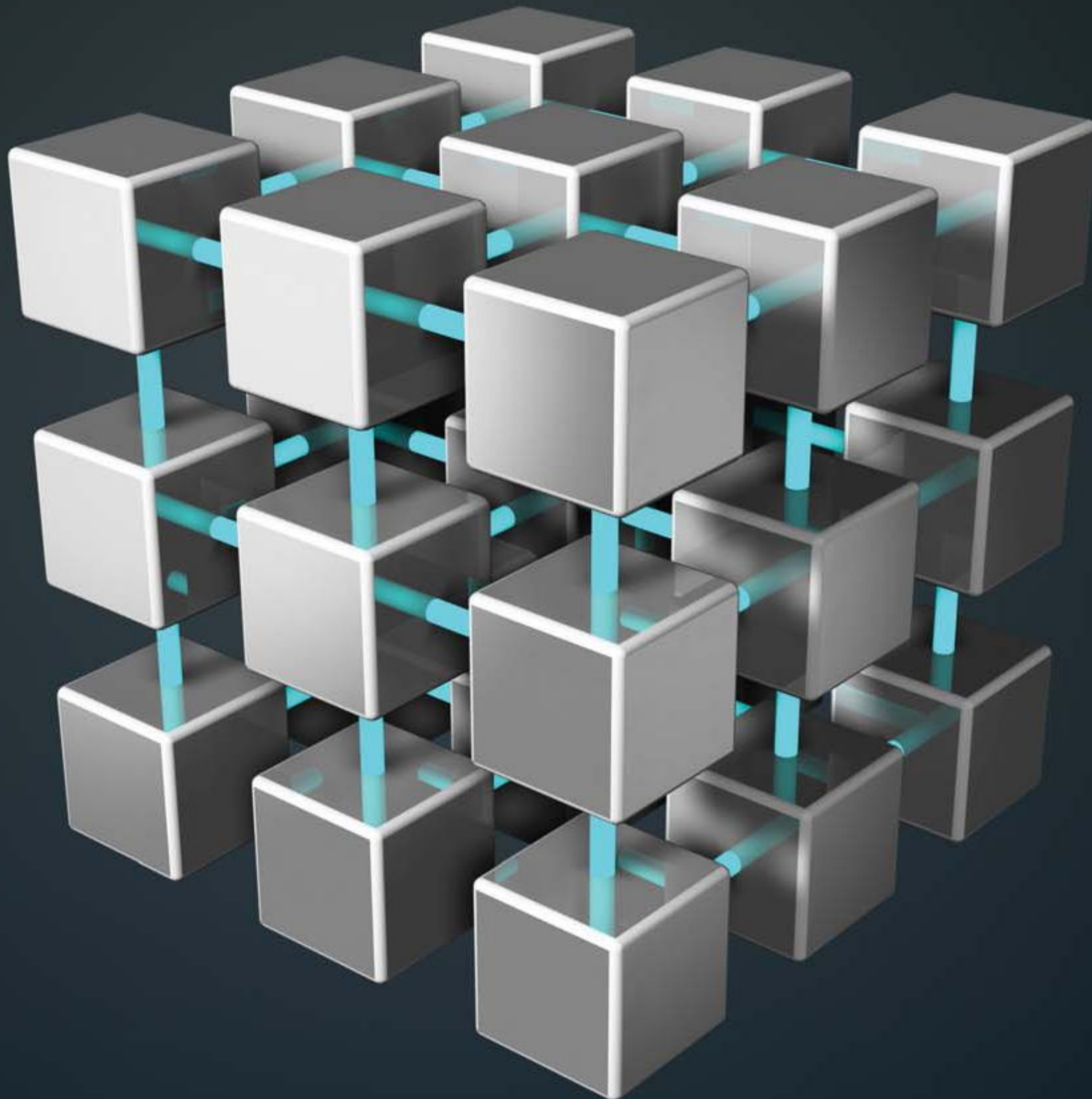
< FACTFILE >

Founded: Babel 1999, Montreal since June 2005**Location:** Montreal, the Nortel building: the biggest brick building in North America (apparently)**Number of staff:** 100+ full time and 350+ contractors**Current projects:** 20 to 30 in test currently**Previous projects:** over 500 projects delivered since starting Montreal**Key personnel:** Jon Atkinson (general manager, Montreal); Lewis Glover (director of quality assurance, PC and console)**Contact email:**

Jon.atkinson@babelmedia.com

control, telling them you are visiting Montréal to work in games gets an appreciative nod rather than a 'what?' from the man behind the screen."

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2003, 2005, 2007 and 2008

CANADA

< FACTFILE >

Founded: 2007

Location: Vancouver

Number of staff: 18

Current projects: First unannounced multi-platform title

Previous projects: *Company of Heroes* (Relic), *Impossible Creatures* (Relic), *Homeworld* (Relic), *Need for Speed* (EA), *NHL* (EA), *NBA Live* (EA) and *FIFA Soccer* (EA)

Key personnel: John Johnson (CEO and creative director), Angie Radywan-Pytłowski (CCO officer/art director), Drew Dunlop (CTO / technical director)

Contact email:
info@smokingguninc.com

THIS VANCOUVER-BASED outfit is relatively new, having been in business for just over 12 months – but its founding staff have worked on a

number of key projects inside Canada's publisher-owned studios.

Johnson and a number of his colleagues left Relic last year to form their own venture working on new IP. Although still closely under wraps, the new game has impressed those who have been lucky enough to see it so far – last month the studio announced that it has just closed a multi-year, multi-million dollar financing agreement to expand the studio and create the new property.

Johnson is positive about the effect big business-owned studios have had on the Canadian game scene.

"I think it's created a very strong industry – just look at the growth we've had in the past few years," he tells us. "We have a lot of new studios creating a lot of great products. I think there is more that can be done for Canadian owned studios: currently there are some issues in terms of how much tax credit foreign owned companies receive over



local Canadian owned studios."

He also says that subsidies and tax credits have been a clear part of the Canadian growth story – and that if the currently subsidy-less British Columbia and its Vancouver capital were to launch a tax credit it would benefit greatly.

"I believe that having more provinces follow in the footsteps of Quebec, Ontario and Manitoba in developing tax incentive programs would only

strengthen and continue to build the industry further," he says.

"These tax incentives do create additional benefits for Canadian owned studios, but would also help to promote more independent start ups and create additional business opportunities that could ultimately deliver more benefits to the local economy."

That said, Johnson adds that there are other state-level things which would also help the Canadian games scene: "Having more universities and secondary schools recognise the importance and economic value that the industry creates in Canada would help to produce the talent needed for the growth that we're seeing."

"Talented people is the key," he adds. "To us a great work place is working closely, with talented passionate people all focused on making the types of games which remind of us why wanted to work in this industry in the first place."

DAVIS

GAMES LAW FIRM Davis has offices dotted all over Canada and provides a range of services for clients involved in all aspects of the business from development and publishing through to distribution.

Davis was the first national law firm in Canada (and one of the first globally) to create a dedicated video game law department, comprised of a group of lawyers from across the firm with expertise in taxation, employment, immigration, commercial law, litigation and other areas of expertise required by video game companies. It's also one of the few Vancouver law firms with its own dedicated immigration lawyers – no doubt useful when the city is full of studios populated not just by Canadian staff but also developers from the world over.

"The Canadian games scene, and in particular the Vancouver industry, has grown rapidly in the last several years.

The games being developed and published here are outstanding, and the games community in Vancouver is vibrant, fun, and first class," says Alison Cumming, the firm's practice group manager.

"The rapid growth of the games scene in Canada has attracted talent from around the world. Gaming companies are relying more and more on foreign workers to fill existing labour shortages in the high tech sector. While this poses some challenges from an immigration standpoint, this pooling of international expertise also makes the industry in Canada, and in Vancouver in particular, dynamic."

And with key clients across the industry in Canada, the team also has a good view on the fact that the country is such a prime source of talent.

"The growth and strength of the Canadian games scene arguably boils down to the industry's ability to attract

and retain top talent. Increasingly, companies are thinking strategically about attracting and retaining international expertise by capitalising on Canadian immigration rules and regulations. While Canada competes with countries like the United States for high tech workers, our immigration system offers foreign talent far more benefits than can our neighbours to the south," explains Cumming.

"Companies will want to communicate to potential hires that there are numerous options for obtaining work authorisation in Canada, that the spouses of highly skilled foreign workers in Canada are eligible to receive their own work permits, and that companies can nominate foreign employees to have their applications for Canadian permanent residence fast-tracked. Such strategising is a key area where immigration lawyers can add practical value."

< FACTFILE >

Founded: March 25, 1892

Location(s): Vancouver, Calgary, Edmonton, Whitehorse, Yellowknife, Montréal, Toronto, Tokyo

Number of Staff: 540

Key Personnel: Chris Bennett (video game and intellectual property law), Craig Natsuhara (immigration law), Mike Coburn (tax and business law), Tudor Carsten (litigation), Sarah Dale-Harris (technology and intellectual property law), Pablo Guzman (litigation and security), Suzanne Kennedy (employment law)

Contact email: Chris Bennett – cbennett@davis.ca

CANADA

< FACTFILE >

Founded: March 2006 as Backbone Charlottetown

Location: Studios located in Charlottetown, PEI and St John's, NL – Canada

Number of staff: 50+

Current projects: *Neopets: Quizzara's Curse; Story Hour: Adventures; Puffins: Island Adventure*

Previous projects include:

Castlevania: Symphony of the Night, Tron, Discs of Tron, Ultimate Mortal Kombat, Super Monkey Ball

Key personnel: Andrew Ayre (CEO), Deirdre Ayre (studio head)

Contact email:
contact@otherocean.com

EVEN THOUGH ITS staff headcount is just 50 or so, Other Ocean's influence will soon spread across two sites – its studio in Charlottetown, Prince Edward

Island will soon be joined by one in St John's, Newfoundland – and the company is responsible for the best-selling iPhone game so far, *Super Monkey Ball*. Not bad for a studio that was only spun out of Foundation 9 a year ago.

It's no surprise to find this busy downloadable games studio expanding, either – *Monkey Ball* aside, its work on XBLA game *Castlevania: Symphony of the Night* was widely praised, and the studio has been entrusted other key IPs to get onto new platforms too, such as its XBLA *Tron* games for Disney.

But while the company is growing and finding its talents in demand, Deirdre Ayre says that the small studio approach works in its favour: "In Charlottetown we have multiple teams working on different projects and directors of each discipline who oversee development in their departments. We do try to be flexible and use processes



that work best for each team. That's the beauty of smaller studios."

She adds: "Our projects tend to have short dev cycles so we don't have to wait long to see our hard work on the shelves or being downloaded. It's nice to have that sense of accomplishment without having to wait years. Also small studios allow employees to use and develop many skills and have a hand in lots of different projects – so nobody gets pigeon holed into a particular activity."

OTHER OCEAN

All of which is probably very satisfying to Deirdre's brother Andrew, who founded the studio at a time when the Atlantic Canada games scene was relatively non-existent. Ayre has some key advice to pass on when we ask her what can be done to keep Canada strong: "We should continue to invest in our youth to ensure skilled graduates for this popular career choice and growing industry. In Atlantic Canada the provinces need to stay on board while we continue to put this region on the map as a solid and good place to do business. The companies need to stay committed to the quality of their products, the development of their technical assets and the high level of service to their customers so publishers continue to place great projects in our studios. It might sound obvious but I can't say it enough – look ahead."

FOG STUDIOS

< FACTFILE >

RIGHTS MANAGEMENT and studio representation company FOG is one of the longest running games firms in Canada. Although not a developer itself, the company has worked with a number of key studios on a raft of properties – in total, North American sales boss Adam Spencer estimates the company has helped over 6,000 games make it to market. The studio's management say that achievements in its history include negotiating the first seven figure development and IP placement deals in the industry, the first eight figure development deal, and the first nine figure multi-title, multi-year licensing deals.

And with clients around the world and a HQ in Canada, the team has a unique perspective on the rise of the country's games industry.

"We started an office up in New Brunswick for a number of reasons, both personal and professional, but the reason we've stayed is that there really

is a movement to give this industry a foothold in the national business landscape – in some provinces at least," explains Spencer.

"As the industry grows as a whole you're obviously going to see new studios popping up everywhere – Canada included. I think it's premature to gauge the amount of growth so far. Sure, your EA's, Ubisofts, and Eidos' of the world have opened offices here but they can really do that anywhere. What's important is that it's indicative of them being aware of a certain level of talent in the country and the fact that there is potential there for that to develop into something really quite special."

Spencer says that the tax breaks and subsidies in some Canadian states have unquestionably helped the region rise to prominence. "There is a ton of talent in Canada but without incentives from the government there is no real venue for that talent to shine. If all of that goes away the talent is going to go with it –

whether it is overseas, south of the border to America, or into other sectors of industry. I think the government needs to do all it can to foster the growth of not just this industry but the talent inherent in it."

And when FOG's current clients have around 1,200 personnel between them, the firm has a good view on what's needed to further grow the Canadian games market – and Spencer echoes his contemporaries when it comes to calling for better education.

"When you speak of growth I think it's important to look towards the future and as such education is a huge piece of promoting growth in the industry. A lot of the educational programs in this country aren't really up to snuff when it comes to preparing young people for this industry. They're relying on dated models and practices and it's causing kids to come out of school not just unprepared but oftentimes misguided – and these programs aren't cheap!

Founded: 1979

Location: Fredericton, New Brunswick – Canada; Langhorne, PA – USA; Kharkov, UA

Number of staff: 14

Current Client projects:

Sadness, Egor, Tomb Raider, Marvel Ultimate Alliance 2 and about 20 other as yet unannounced titles

Previous projects: *Puzzle Quest, Castlevania, Neopets, Soldier of Fortune: Payback, Command and Conquer, Miner 2049er, Spy Vs. Spy, Test Drive, Teenage Mutant Ninja Turtles, ESPN 2K Sports*

Key personnel: Ed Dille (founder)

Contact email:
sales@fogstudios.com

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CANADA

< FACTFILE >

Founded: 1998

Location: Québec City, Canada
Number of staff: 115

Current projects include: *Dig It Up!* (XBLA, Wiiware, in production); *Star Fever Agency* (casual MMO, online prototype); *The Game of Life* (RealArcade, PC downloadable); *HuruHumi* (scenario, virtual world)

Key personnel:

Guy Boucher (president and creative director); Pascal Tessier-Fleury (VP operations and finance); Dominique Benoît (VP sales and marketing)

Contact email:

sara.garneau@sarbakan.com

QUEBEC CITY-BASED Sarbakan is one of the few independents in the publisher studio-dominated province of Quebec, and has managed to hold its

own in a region rife with aggressively-expanding rivals in its ten years of business.

According to marketing director Sara Garneau, a lot of that has to do with the studio's casual emphasis. Its 115 staff have worked on a raft of games over the years for a variety of formats – PC and Flash – and have supported a number of developers on games including *Wedding Dash 2* for PlayFirst, and *Disney Fairies*. Current projects include original games *Dig it Up* for XBLA/WiiWare and a casual MMO called *Star Fever Agency*, currently in the prototype phase. It also continues to co-develop with other studios or for other big publishers, helping RealArcade with its PC downloadable version of *The Game of Life*, for instance. And its first DS game *Wordmaster* was released earlier this year. Not bad for a company that started out in 1998 not as a game developer but as a 'creative content

studio' yet has forged a key reputation for itself in the industry since.

Work on projects with relatively shorter cycles is better for staff engagement, says Garneau: "At Sarbakan, everyone has the opportunity to get excited all over again about every new challenge. That's because Sarbakan tackles projects that usually take under one year to complete, projects of varying scopes for varied clients, IPs and platforms. In the world of casual gaming, there's no doubt that there's someone you know who plays the games you make, and that makes all the difference."

The studio is split into seven autonomous multidisciplinary cells which manage the entire production of a project in close collaboration with the publisher. "This methodology allows our teams to tackle numerous projects at once while maintaining optimal productivity levels and guarantees that

all games unfailingly meet or exceed their expectations," she says.

But like many Canadian developers in the subsidy-supported Quebec, she brushes off concerns that tax credits are the be all and end all of the territory – and isn't convinced by the argument that they make a region weak. "The government subsidies played a vital role in kick-starting our industry. They carried new companies during their start-up phase, when venture capital was harder to secure. Serious developers have implemented, over the years, strategies that allowed them to operate without any subsidy. It's true that some developers used their subsidies to position themselves as 'cheap labor,' but they only managed to shoot themselves in the foot and aren't really competitive anymore; if their subsidies were to disappear, so would they. On the other hand, the developers who produce quality games will continue being successful."

SARBAKAN

ENZYME LABS

ENZYME LABS was founded in 2002 and, thanks in part to the rise of the Quebec game scene around it, has since grown to become a leading name in multilingual video game testing.

The company boasts that it offers a large-scale dedicated multilingual secure facility which "helps video game publishers and developers reduce production costs, enhance the gaming experience and shorten time to release on the market". Its teams have experience in a variety testing demands, including pre-certification, functionality, linguistic testing, game play, focus group and product evaluation, compatibility, connectivity, MMO load testing and customer support services.

Explains marketing director Andre Davignon: "Our studio is structured into teams dedicated to the specific game testing services that we provide. We have specialist and project managers who are responsible for specific projects

"We believe our success comes from our team and that's why we put a great deal of effort into keeping them happy..."

and functional areas so that we can effectively manage a projects progress and rapidly adapt to any requirements our customers may have. We also promote cross functional training which permits us to be highly flexible in managing our workload."

He also adds that Enzyme differs from other QA firms by keeping a large number of staff in-house. "We value our employees and believe that keeping them happy is the best way to ensure delivering quality to our customers. In addition to on-going training programs, we provide all of our employees with a complete benefits package, access to a games room and two cafeterias. We have a very active social committee that organizes outings, video game tournaments, the corporate soccer team, contests and publishes an internal newsletter. We believe our success comes from our team and that's why we put a great deal of effort into keeping them happy."

< FACTFILE >

Founded: 2002

Location: Ste Adele, Quebec (Head office) & Montreal, Quebec

Number of staff: Over 300

Key personnel: Yan Cyr (president and CEO; ycy@enzyme.org); Emmanuel Viau (vice-president and COO; eviau@enzyme.org); Sophie Barnaud-Blancheton (business development manager; sblancheton@enzyme.org)

Contact email:

info@enzyme.org

< FACTFILE >

Founded: July 2000**Location:** Lunenburg, Nova Scotia, Canada and Halifax, Nova Scotia, Canada**Employees:** 145**Current Projects:** EA Sports NBA LIVE 10 PS2/PSP; Tiger Woods PGA Tour 10 PS2/PSP; EA Sports FIFA 10 PS2/PSP**Previous Projects:** THQ Big Beach Sports; Konami Rock Revolution; EA Sports NBA Live 09 All Play; EA Sports NHL 09**Key Personnel:** Jeremy Wellard (president & creative director); Chris Pink (technical director); Peter Jones (art director); Kirsten Tomilson (senior project manager); Peter Garcin (director of audio)

DO NOT CONFUSE HB Studio's location on Canadian peninsula Nova Scotia for a lack of power or presence on the global stage – this independent

has featured prominently in the *Develop 100* for the past four years, placing it alongside a number of heavyweights and studios with commercial clout.

That's thanks in part to a very good relationship with EA which has seen the publisher entrust the studio with development of 16 of its sports games since 2002. EA Sports' cricket and rugby SKUs were original hits for the firm which has recently branched out into a number of new projects for other publishers as the studio grows. These include *Big Beach Sports* for THQ and *Rock Revolution* for Konami.

As the studio grows – it last year opened a studio in Halifax, NS just down the road from its Lunenburg HQ – the management team have fought hard to keep employee satisfaction high. Operations director Melanie Williams says staff benefit from "cost of living significantly lower than other city centres" and a number of company



perks such as free on-site daycare, regular social events and expense-covered trips contribute to a good mood amongst its 145 professional staff.

It's things like this which British-born studio founder Jeremy Wellard says helps the studio stand out amidst the East Coast Canada development scene rather than its tax credits: "It has been interesting for an ex-pat Brit on this side

of the water to follow the constant sniping from the UK at the Canadian 'subsidies'. There is so much generalisation and lack of knowledge about the whole subject. It seems to have become an excuse to deflect attention away from the inadequacies that exist in the UK industry. When I left Codemasters in 1999 to come to Canada the UK games industry was a miserable place to be. Development staff drifted from one job to another on a whim, massive crunch time was the norm and creativity seemed to be at an all time low. Coming to Canada at that time was a major breath of fresh air. The industry was new to the east coast of Canada and there was fantastic enthusiasm and hunger to be part of the games scene. Things have certainly improved in the UK but there are still some key aspects that need to be looked at and improved if it is to compete with Canada."

QUAZAL

ANOTHER TEN-YEAR veteran of the Canadian games industry, Quazal is also a major player on the middleware scene.

Founded in 1998, Quazal's in-game networking and game state engine solution launched three years later in 2001. Another three years after saw the 2004 release of its online lobby and community system Rendez-Vous. 2007 saw the introduction of its 'Lobby in a box' product Spark! which allows for rapid implementation of game lobbies.

At the same time the firm has, in its decade of business, used a prime position in Montreal to grow its resource, with dedicated teams for in-game tools R&D, backend systems R&D, developers support and relations, plus hosting operations. In fact, the team has grown so much that Quazal is moving into dedicated custom-built premises in downtown Montreal.

"From our perspective the availability of highly skilled developers remains the



number one reason to remain in Canada," explains COO Henry Ryan.

"Tax incentives without the talent is untenable. Government support is very helpful but the deep well of talented, home-grown developers and artists is the real reason to be here."

Quazal is a perfect example of a company whose existence hinges on the usefulness of local tax incentives,

but which has since grown to its own independence.

Says Ryan: "We found that early in our growth, government support was invaluable. However, once established we have been able to make our own way in the world. That support is still important to encourage the continual creation of new companies to keep energising the market and to support the larger, more established incumbents."

And Quazal is experienced with working with those big-name studios. It's a key point the firm stresses, especially when it comes to recruiting staff.

"Our developers get to work on hard problems," says Ryan when asked why Quazal is a good place to work. "Building and supporting online gaming technology that can operate in AAA titles in a robust and highly scalable way is challenging. Our location in the heart of downtown

< FACTFILE >

Founded: 1998**Location:** Downtown, Montreal, Canada**Current projects:** Operation Flashpoint 2, Bionic Commando, World in Conflict, Splinter Cell Conviction**Previous projects:** Rock Band (and Rock Band 2), Company of Heroes, Supreme Commander, Pure, Kane & Lynch, Rainbow 6 Vegas**Key personnel:** Sylvain Beaudry (CEO)**Contact email:** sales@quazal.com

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Universal appeal

Sony Online Entertainment on the
UE3-powered *DC Universe Online*



SAFE AND SECURE: WILL DRM EVER BE ACCEPTED? > P58

When the future comes as standard

MAYBE IT'S JUST ME, but over the past months I've noticed an increasing number of people talking openly about the next generation of game consoles. Of course, it's the right sort of timing, if only in terms of PlayStation 3 and Xbox 360 having been released a couple of years ago and hence fallen back into the description of being the 'current generation' of hardware. What's more surprising however is the rather casual nature with which these people, particularly those in the middleware space, have been talking about next-gen hardware.

Now, maybe they know something I don't: not hard, admittedly. But rather than Microsoft leaking specs, the context seems to be more about the inevitability of the new consoles coming early, combined with the inevitability of their form as variations of the standardised multi-core architecture characterised by Intel's Larrabee *et al.* In a sense, it provides an interesting abstraction to the whole console war which preoccupies us journalists as the next-gen debate limbers up, as differences between the consoles are likely to be reduced a factor of how many cores (and presumably other minor aspects such as memory and bandwidth) they contain. Or 'x' cores good. '2x' cores better.

To that degree then, PlayStation 3, Xbox 360 and Wii (aka GameCube 1.5) could be seen as the last example of a period when game consoles were niche but profitable enough for them to be custom pieces of consumer electronics. No longer niche or profitable in and of themselves, it seems that branding will be the major differentiator for the 2010s consoles. No wonder the representatives of middleware companies are already talking in business-as-usual terms about the future.



Jon Jordan

jon.jordan@intentmedia.co.uk



< CODING >

PERSISTENT OFFENDERS

Persistence and community features are key drivers for networking company Quazal...

IT'S A MARK OF how the technology market is often less about academic smarts, and more about determination to stay in the game, that networking Canadian company Quazal now finds itself having fewer discussions about pure networking and many more about lobby services and out-of-game features.

Rewind ten years, and under the name Proksim, the company was out to revolutionise game networking with its clever distributed object technology, Net-Z, which was designed to reduce complexity and bandwidth costs by using a peer-to-peer architecture. But following several business curve balls, not to mention the cheapness of bandwidth, the renamed and resurgent Quazal found its place in the middleware ecosystem thanks to its Rendez-Vous SDK, used for creating game lobbies and adding community features. It now also offers a simplified version called Spark!, which is designed for studios who want to get their game online and working quickly. It's feature-light, of course, but most games don't need unique online features, so it fulfills the need for straight-out-the-box deployment. Quazal still sells Net-Z, but it's certainly not the focus the company founders would have predicted.

"It's not only about the technology anymore, that's for sure," says Mike Drummelsmith, Quazal's jovial developer relations manager. "Not many people are coming to us just for Net-Z. Generally they come to us for Rendez-Vous and Net-Z, or for Rendez-Vous because they're using their own networking code. Instead, what we see is studios looking forward to where online services can go from here. The networking itself isn't changing drastically."

One of the key areas that's currently generating a lot of interest is in-game persistence. "Even if individual game sessions are only five minute affairs, publishers are looking at ways to keep their players invested in the game with features such as role playing-style elements, or avatars that evolve over time," Drummelsmith explains. "Content sharing is big too, such as being able to record game sessions, and create and upload items."

The shift from being a networking expert to a more service-driven company hasn't been without physical consequences for Quazal, as it's had to invest in its own infrastructure. It

Net-X, Spark!, Rendez-Vous

Price: Available on request

Company: Quazal

Contact: +1 514 395 4646

www.quazal.com

recently announced it had set up a new dedicated data centre in its hometown of Montreal to handle the demand for Rendez-Vous, which is typically hosted by Quazal. Together with hosting solutions company Canix, it's also standardised on IBM Blade hardware.

This sort of backend resource is becoming increasingly important, says Drummelsmith, as some clients want Quazal to help out by providing dedicated game services for special projects, especially those who are pushing the envelope in terms of online services.

"For example, we're working with one title that involves movie uploads, which is reasonably CPU-intensive as we're doing the processing on the backend," adds CTO Martin Lavoie. "That's another nice thing about the deal with IBM. If we need more equipment, it can provision us with new hardware at short notice and we can just rack new blades into our data centre. Otherwise, it can take weeks to expand."

"Publishers really have to think much more seriously about their requirements now," adds Drummelsmith. "As soon as they predict they might be dealing with thousands of concurrent users, we start to get serious about planning properly because if you underestimate, things can go bad very quickly. Whereas if you overestimate, okay, you spend extra money but the game runs smoothly and there's no stress."

As for future releases of Rendez-Vous, the company is working on making it more accessible and flexible. "We're opening up the backend to allow people to create more scalable web services, so they can build their community websites around the technology," reveals Lavoie. "We're also working hard revamping the tools on the management side of Rendez-Vous so development teams have more reliable access to their servers and more information about what's going on."



A recent game using Quazal's technology is Disney's Pure



< CODING >

THE VISION THING

German vendor Trinigy is futureproof thanks to the new streaming tech in its Vision engine...

Vision 7.1

Price: Available on request
Company: Trinigy
Contact: +49 7121 986 99
www.trinigy.net

DESPITE CLARION CALLS FROM our analyst chums that gaming is a recession-proof industry, the combination of economic issues and our position within the console boom-bust cycle means these are tricky times for the brainiacs designing the next-gen consoles. (And no, we don't mean Xbox 360 and PlayStation 3.)

Of course, multi-core, multi-chip hardware is already available – even in terms of massmarket laptops – but the jump from dual core to hundreds of cores will make all the difference. It's such a clear trend that many of the game engine companies are already building it into their current generation technology.

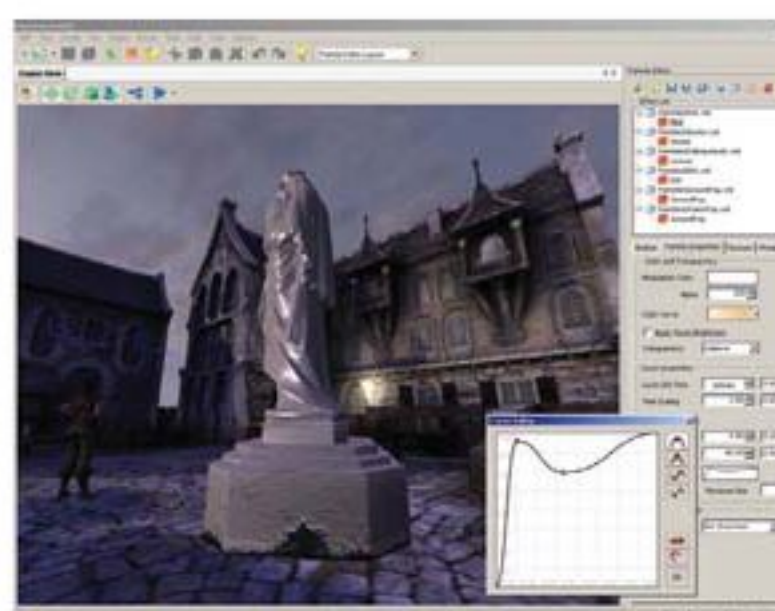
"The next thing will be massively parallel architecture and the tests we're doing with our stream processing technology in Vision 7 are designed to

support that," explains Dag Frommhold, MD of German outfit Trinigy. "Typically at the moment we're looking at four to eight cores, but there will be many more in future, and the stream processing is developed with that in mind. We're moving more of our internal development to ensure the new features we roll out for Vision also support it."

Released during the summer as version 7.0, and updated to 7.1 in September, Trinigy's Vision engine has always traded on its combination of modularity, solid integrated tools and competitive price.

"Both from a market and technical perspective, we always try to be somewhere in the middle," says Frommhold.

"Our focus is different from competitors such as Epic and Emergent. I think we have a package that's significantly more modular than Unreal. Of course, it's not as complete, but we have a pretty competitive price and if you compare us to Gamebryo we have a more complete feature set. We're in a relative sweetspot."



The most recent focus for the technology has been meeting customer demand for large-scale open worlds, hence the new stream processing engine. "Vision is one of the few engines that can stream all types of resources including geometry, terrain, textures, shaders, animations and physics data," he points out. "The system is also cross-platform, so the same code you used for PC and Xbox 360 can be recompiled for PlayStation 3 and it will automatically run on the SPUs and handle all the DMA transfers."

Access to the stream processing is supported within Vision's vForge editor,

which was extended in the 7.0 release with a new terrain system, including vegetation painting and the ability to cut holes in the terrain to build caves and tunnels. Load/unload criteria for asset streaming, as well as more advanced options such as assigning resources to zones, can also be carried out in vForge.

"Because the engine is modular, we didn't have to do much modification to support streaming," says Frommhold. "We mostly just extended the architecture, which is designed so we can build features on top of the core without touching it."

Other recent additions to Vision include networking integrations with PX Interactive's NetDog engine and Quazal's Net-Z and Rendez-Vous technologies.

"We focus on what we're best at, which is rendering, infrastructure and tools," Frommhold states. "Networking isn't part of our main business so we think it's better to go with specialists. These people are much better at networking than we could ever hope to be."



< CODING >

FROM WALK CYCLE TO RUN TIME

Autodesk may be well known for its art tools, but it's moving into middleware fast...

Autodesk Games Middleware

Price: TBC
Company: Autodesk
Contact: +44 207 851 8000
www.autodesk.com

IT WAS PERHAPS THE most surprising of the big middleware buy-outs of the past 12 months, but much like Nvidia's acquisition of Ageia and Intel's snapping up of Havok, Autodesk's purchase of French artificial intelligence company Kynogon has been followed by the prolonged sound of silence. Apart from a corporate announcement highlighting "the future of video games is about more believable characters and environments," there's not been much explanation of Autodesk's move from modelling and animation tools into the runtime world.

Michel Kripalani, Autodesk's senior games industry manager, is happy to put the record straight however. "We saw the need to move from the asset

creation space," he explains. "With the next generation of gaming platforms, the focus is going to be on runtime simulations. Of course, art tools are also becoming more tied into physics and AI, and while we already had the HumanIK technology, we wanted a complete team that could develop, market, sell and support middleware. It's different to our primary business so that's why we purchased Kynogon."

Kynogon's Kynapse AI engine is still available for licensing, together with HumanIK, through Autodesk's new Games Technology Group. In fact, this is being headed by Pierre Pontevia and Jacques Gaubil, Kynogon's co-founders, and while Kripalani says he can't talk about specific numbers, the team has received resources to grow "appropriately" in terms of its role as the spearhead of Autodesk's middleware business.

There's no news on when the reveal will be made, but Kripalani confirms the goal is no secret. "What we're focusing on is a complete solution for believable characters and that will run from art packages to runtimes."

Three main components are planned; each of which will be available as a standalone as well as being fully integrated with the other parts and third party game engines. It's an approach Kripalani refers to as an 'a la carte' menu. The first is a character-oriented physics system so a character can fully interact with a dynamic environment. Next is the artificial intelligence piece, which will provide the smarts for the characters to act in a believable manner. Then, there's the animation system so characters can walk, crawl and climb over obstacles. Basically, it all boils down to physics, AI and animation.

"All these technologies are progressing, but as one progresses the others have to keep up or the believability is lost. For example, if you have this great exploding world but the character can't climb over a one-metre piece of rubble, the whole illusion is destroyed," says Kripalani.

Finally, there's the need, in turn, to integrate this technology back into Maya and 3ds Max. "It's vital that artists are in control of the process, not



programmers," Kripalani argues. "Once everything in-game is procedural, artists have to be creating those procedures and that's the direction we're taking Max and Maya."

But as for the timeline, he's fairly pragmatic. "I expect we'll get a large portion of job done with this generation of hardware but what we're being really clear about is where we're going. We'll get there in small stages. We've seen it in films with things the Uncanny Valley. Those are the sort of complex problems we're going to have to solve to get believable characters into games, but that's the goal."

MODELLING PACKAGES

Shaping the

Despite the Autodesk hegemony over 3D modelling packages, there's still plenty of variety when it comes to choosing innovative features, reckons **Jon Jordan**...

With Autodesk now owning almost all the market when it comes to game modelling tools, thanks to its control of 3ds Max, Maya and Mudbox (not to mention animation package MotionBuilder), its competitors are having to act smarter in order to find niches in which to apply advantages. (Well, we say competitors – as we go to press Autodesk has announced the acquisition of Softimage from Avid for \$35m.)

For Softimage, the switch comes with the introduction of its Interactive Creative Environment; something the company hopes will see it evolve from a 3D application company to a technology platform company. It's a move which certainly fits into wider trends where smaller players such as Luxology and Nevercentre are promoting their packages (Modo and Silo respectively) as highly flexible tools that will fit into any workflow. Of course,

"Price deflation continues apace..."

to all intents and purposes that now means an Autodesk pipeline makes the situation easier for everyone, although it will be interesting to see whether completely open standards such as Collada thrive or wither in the face of Autodesk's similar FBX file interchange format.

Perhaps most significant, however, is that price deflation continues apace. Compared to even a couple of years ago, in relation to the depth of features each contains, the cost of packages – especially when it comes to Modo and Silo – is little short of miraculous.

MAYA

TECHNOLOGY

Maya 2009

CLIENTS

A2M, Blitz, EA, Factor5, Radical, Rare, Rockstar, Secret Level, Sony

HOST PLATFORMS

Windows, Mac OS, Linux

PRICE

Maya Unlimited (\$4,995),
Maya Complete (\$1,995)

CONTACT

+44 207 851 8000

Autodesk



Maya 2009 includes new UV tools

www.autodesk.com

One of the key additions to the latest version of Maya is nParticles, which is an extension to the Maya Nucleus unified simulation framework.

It works in conjunction with the original nCloth release, enabling

simulations using liquids, gases, and cloth. Other features include integration with products such as MotionBuilder, new muscle and particle features, better scene segmentation and support for multi-threading.

3DS MAX

TECHNOLOGY

3ds Max 2009

CLIENTS

Blizzard, Bungie, BioWare, Creative Assembly, EA, Epic, Midway, Mythic, Rockstar, Ubisoft

HOST PLATFORMS

Windows XP

PRICE

\$3,495

CONTACT

+44 207 851 8000

Autodesk



3ds Max 2009 has better support for FBX

www.autodesk.com

Due to a reset of the 3ds Max release schedule from autumn to spring, the 2009 version (actually released in April 2008), only received six months of development time.

The focuses included UI tweaks, more flexibility for rendering, new

workflow for the Biped animation system and new materials for the mental ray renderer. The support for file formats such as OBJ and Autodesk's cross-application exchange format FBX were also improved.

SOFTIMAGE XSI

TECHNOLOGY

SoftimageXSI 7

CLIENTS

Bizarre Creations, Capcom, Crytek, Konami, Namco, Pandemic, Ubisoft, Valve

HOST PLATFORMS

Windows, Linux

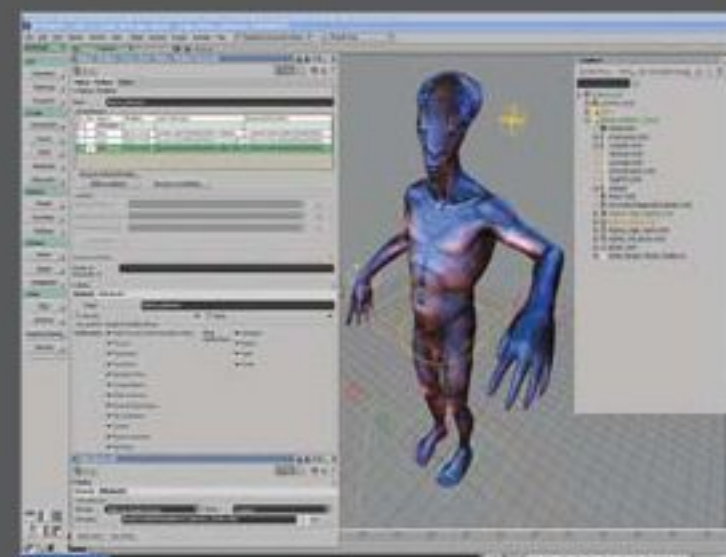
PRICE

Essentials (\$2,995), Advanced (\$4,995)

CONTACT

+44 1753 655 999

SOFTIMAGE



XSI 7 includes the new ICE workflow tool

www.softimage.com

The big news when it comes to the latest version of XSI is ICE, or the Interactive Creative Environment. It's an open platform that enables artists to extend the capabilities of XSI using a visual, node-based dataflow rather than coding or scripting.

The first release of ICE focuses on particle effects and deformations, but the next version will include kinematics. The XSI core is now also fully multi-threaded, making the application even faster than its competitors.

future

LUXOLOGY

TECHNOLOGY

modo 302

CLIENTS

EA, id Software, Massive, Sega, Sony

HOST PLATFORMS

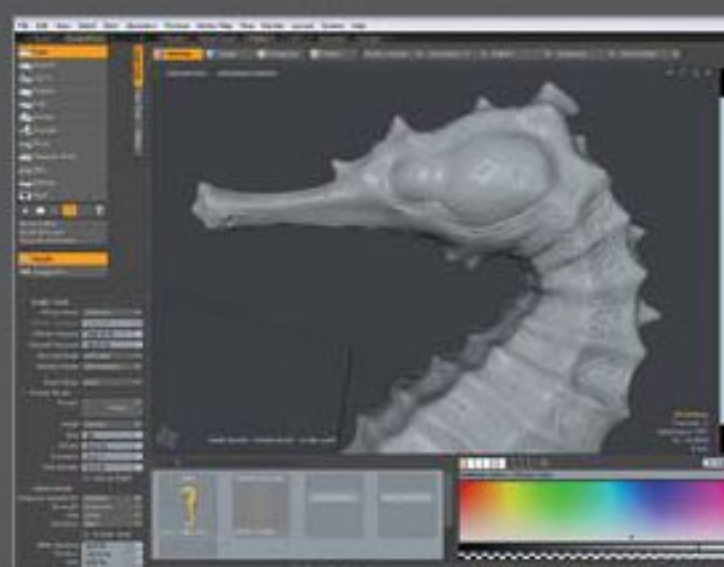
Windows, Mac OS

PRICE

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CONTACT

+1 650 378 8506



Modo is a modelling, rendering and painting tool

www.luxology.com

Combining a rich set of features such as modelling, rendering and painting, as well as animation and 3D sculpting, modo 302 also brings more flexibility for studios who want to integrate the pipeline art package into their tools,

thanks to the release of the software development kit. Other changes from modo 301 see new natural lighting capabilities, additional layered Photoshop file support, an animation Track View, and additional modelling tools.

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Silo is one of the upcoming modellers

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Silo is designed to be a streamlined modelling package which provides the ability to switch between organically sculpted high-polygon subdivision models and precisely controlled hard-edged surfaces. Highly customisable, you can change the mouse, keyboard,

and graphical interface to emulate other packages. The pro version comes with advanced UV and displacement painting tools, while the Topology tool enables you to directly draw new topology onto an object.

Sharing Tools



by David Jefferies

Black Rock Studio



AS I WRITE THIS our sister project *Pure* is riding high in the charts, and the team has come back from R&R, finished merging their code back into the main branch (we lock a game's branch a couple of months before submission) and have started to look to the future.

When they began *Pure* they had an old legacy codebase from their previous quad bike games, and we had an even older, C based, codebase dating back to the original *MotoGP* in 2000. Over the years we have worked hard to share a common set of functionality, so while the game code was different we had a central set of libraries that covered all the main areas like maths, STL, serialisation and rendering.

The *Pure* programmers discarded their legacy codebase and wrote a new codebase using the existing libraries that we share. It made sense, then, that when we finished *MotoGP* forever and started our new title we took the *Pure* codebase as a starting point.

So back in 2007, after seven years, we had finally unified on a single codebase and set of central technology libraries.

Sharing the game code is all well and good, but actually the biggest gains come from sharing the tools. It can take ten times as long to write the tool support for a feature than the runtime support. If you don't share tools then you likely don't share exporters, so you're not sharing the big stuff.

We've always developed our own modelling, texturing and level-editing tools rather than relying on Maya and Max or Modo. This allows us to develop shallow, targeted tools that do what we want to do more efficiently than a general-purpose package, though we do still use the commercial packages when it makes sense.

However, because *Pure* and its predecessors are heightfield based, the team had a legacy tool for editing the height field and placing AI splines. Over the years it had evolved into a bit of a mess, but was still the most crucial component in their tool chain.

Now they're starting on their new project, they've decided to rewrite their heightfield tool and that finally gives us the opportunity to unify our tool chain. The new tool will sit alongside our other tools in our QT4 framework, using the same exporters, meaning all the code they write for it will be easily shareable by us and we can collaborate on big new features.

Sharing is the best weapon we have against the endlessly rising cost of game development, and by sharing the tools and exporters in addition to the game code we can devote more resources to differentiating our games from those of our competitors.

www.blackrockstudio.com

KEYRELEASE

The cold edge of progress

Softimage's reinvention as a platform company is coming courtesy of its new ICE visual interface for XSI, discovers **Jon Jordan**...

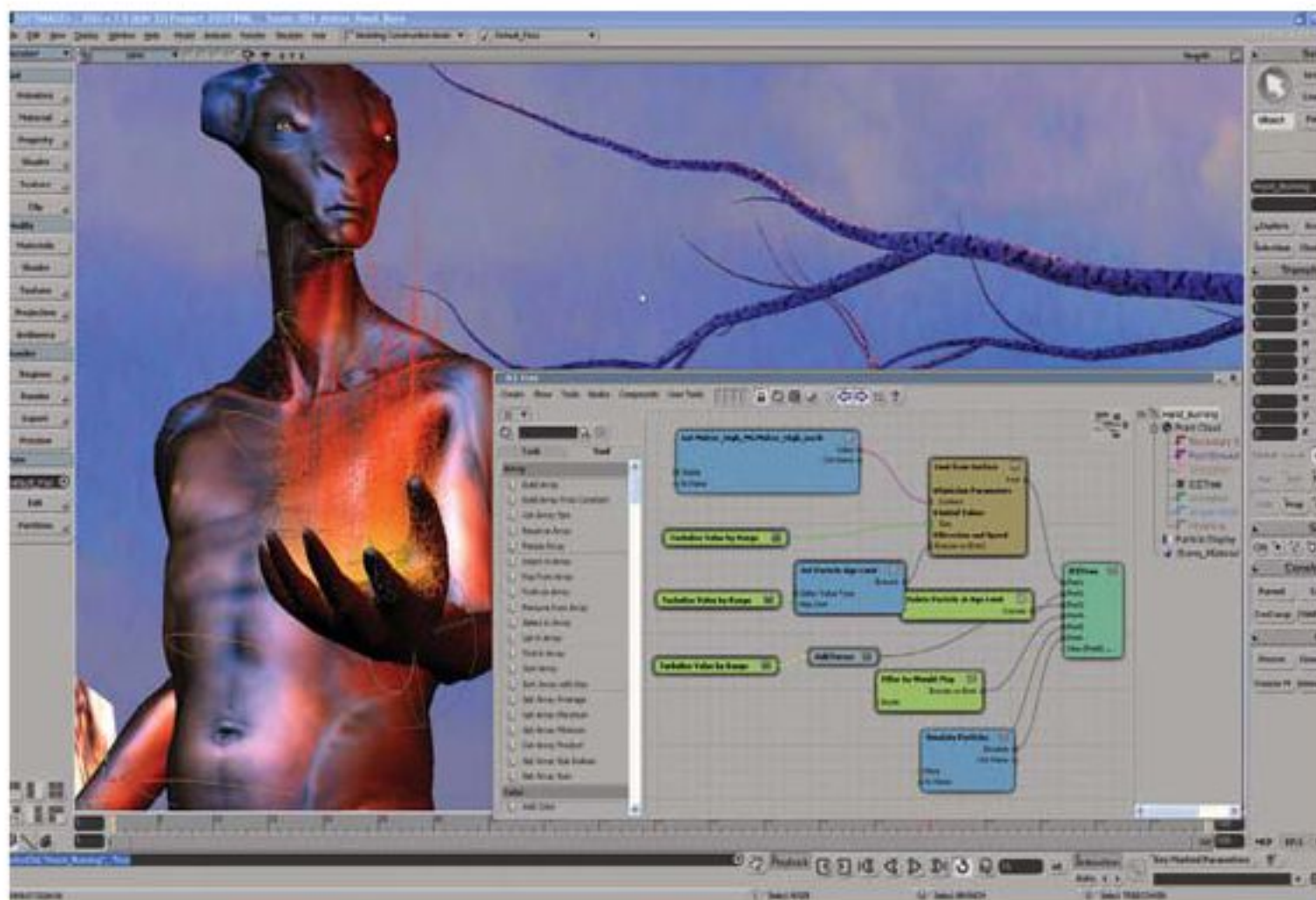
SOFTIMAGE HAS ALWAYS BEEN

something of a niche operator, with XSI battling for attention among the more numerous seats of 3ds Max and Maya. Now, however, the company is up against Autodesk's combined Max, Maya, Mudbox and MotionBuilder 800lb behemoth. Indeed, Autodesk reckons it has around 90 per cent of the games market when it comes to 3D art packages.

So if you can't compete on scale, you have to compete on innovation. But according to product marketing manager, Leonard Teo, Softimage isn't just looking to compete when it comes to the current level of technology. Its tactics are more forward-looking.

"We're shifting from being a 3D application and DCC company to becoming more of a platform company. That's a huge shift and it's going to be a great differentiating factor in the future, because studios need to build their own custom solutions and they need open frameworks to be able to build their pipelines," he explains.

This might sound like marketing spiel but there are several initiatives backing up such talk. For one thing, Teo says Softimage often comes into contact with game studios that have spent so much time and energy building custom tools using Maya's MEL script or MAXscript that they're



any private companies so you can build an effective pipeline and tools using it and plug it into any package that supports the file format," Teo enthuses. "We are seeing an increasing amount of people standardise on it."

Another focus point for Softimage is the hard work that's been carried out to ensure XSI supports multi-threading. "It's a key differentiating factor," Teo says. "We're moving towards a homogenised computing resource model where your PC will have hundreds of cores, and current applications just won't be able to use that power. We're already over twice as fast as the competition when it comes to things like the million

of the most recent XSI 7 release, and one that seeks to bridge the gap between the ways artists work and the increasingly technical nature of that work.

"We have highly visual people working with tools that are overly technical. Maya, Max and XSI are technical packages and this creates a rift between the artists and the technical directors," Teo points out. "Most artists don't want to learn scripting but they do want more control over what they're doing."

Defined as a node-based visual programming language that enables you to quickly and easily extend what you can do with XSI, ICE effectively replaces XSI's API, although the first iteration, as seen in XSI 7, is focused purely on particles and deformation.

"With the first release of ICE, we decided to target particles and deformation, and lots of companies, especially in terms of post production, are finding a lot of value in that," says Teo. "But the easter egg we released for Siggraph was the ICE Kinematics. That's what's coming and it's the next generation of animation."

Expected (but not promised) for XSI 7.5, which is due in spring 2009, ICE Kinematics is the brainchild of Philip Taylor, who created the CAT character animation plug-in for 3ds Max. "We bought CAT because we wanted Phil's brain in terms of how animation should work," ends Teo. "ICE Kinematic will be a big shock for the industry."

"Studios need to build their own custom solutions, and they need open frameworks to build their pipelines..."

Leonard Teo, Softimage

several versions adrift of the current releases, because they can't manage the migration process. The XSI solution is to advise use of Collada.

"I want to stress our commitment to Collada because there are so many benefits in using a completely open architecture. It's XML-based, fully documented, and not owned by

particle test and that's because XSI scales with the number of available cores."

The main reason that Softimage thinks its future as a platform company is bright, however, is its new approach to artist workflow. Called Interactive Creative Environment (ICE), it's an integral part

PRODUCT: XSI 7 with ICE

COMPANY: Softimage

PRICE: XSI Essentials £1,725, XSI Advanced £2,700

CONTACT: +01 514 845 1636

www.softimage.com



Top: Both deformation and particle effects are shown in this ICE screen

Middle: ICE lets you create dynamically-driven effects quickly in XSI without scripting

Bottom: ICE's node-based workflow enables you to create particle effects quickly

The smiling face of Face Robot

One of Softimage's most interesting recent packages has been 3D facial animation product Face Robot. Certainly high-end in terms of the control it provides for creating facial performances, the initial sticking point was the six figure price point. "I don't want to sugar coat FaceRobot," says Leonard Teo. "The price tag was a problem and in the film and post production market it ended up competing with internal development, but it's now finding its niche in games. In version 1.5, we released a game export pipeline, and in version 1.9 we released a Maya exporter. We're now focusing on optimisations that will enable it to work with real-time motion capture too." Clients include the likes of EA, Sony and Blur Studios.

UNREAL ENGINE 3 (SUPER) POWERS DC UNIVERSE ONLINE FOR PC AND PLAYSTATION 3



Jim Lee, comic book legend and DC Universe Online executive creative director

The following is an excerpt of a story written by John Gaudiosi for www.unrealtechnology.com.

Comic-Con International: San Diego 2008 saw the debut of *DC Universe Online*, the first massively multiplayer online game based on a licensed comic book. Sony Online Entertainment is using Unreal Engine 3 to bring the DC Universe to life as a persistent world for PC and PlayStation 3, and its creative team recently opened up about its experience with the engine.

"Early on we did testing with different engines to see what would be best for developing this game, and Unreal Engine 3 was awesome because it gave us the tools to build this world," said comic book legend Jim Lee, executive creative director for *DC Universe Online* and artist for DC Comics.

"Unreal wasn't originally designed to build MMOs, so there was tweaking that had to be done early on, but the results have been terrific."

Lee said the team of 70 at SOE Austin has been able to do remarkable things with lighting, specular effects and the building of iconic DC Universe characters.

"The Unreal Engine has been great because it's allowed us to change things very quickly," explained Lee.

John Blakely, vice president of product development for SOE Austin, concurred.

"Unreal Engine 3 allowed us to start playing the game from the start," said Blakely. "It gave us a tool base to get art into the game quickly, allowing designers to prototype what kind of gameplay we were going to be developing."

"It's been really useful because we're taking an action game mechanic and blending that with some of the

online persistent world elements. To be able to prototype this from day one, learn what's important, and then build the infrastructure of the game knowing full well what to expect has been invaluable."

Blakely said the Unreal Engine's toolset gave his artists all the pieces they needed from the start, which allowed SOE Austin to staff up quickly on this project.

"Usually with an MMO game, building the content – the environment and characters and all the things you need to create – is the long-lead item," added Blakely.

"We got out of the gate quickly without a lot of disruption, which enabled us to focus on the other fundamental pieces we needed to build, while leaving the artists to work in their world undisturbed."

Comic book fans know that Lee has a very unique style to his art. Chris Cao, studio creative director for *DC Universe Online*, said that Unreal Engine 3 gave the team a jump forward on a lot of the graphics and the ability to render these characters well yet cost effectively.

"Jim's characters have a very cut feel," said Cao. "Our DC characters have a distinct quality, and we didn't want them to look soft or cartoony. Unreal Engine 3 helped us do that."

DC Universe Online features approximately 150 characters from the DC Comics mythology, ranging from well-known figures like Batman and The Flash to lesser known characters like Hawkman.

The entire world of the DC Universe will be there for gamers to discover over time, and with *DC Universe Online* open to millions of gamers, there will be many ways to explore.

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D.I.C.E. Summit
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February 18th-20th, 2009

Please email:
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To discuss anything raised in this column or general licensing opportunities for Epic Games' Unreal engine, contact:
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Mark Rein is vice president of Epic Games based in Raleigh, North Carolina. Since 1992 Mark has worked on Epic's licensing and publishing deals, business development, public relations, academic relations, marketing and business operations.

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HEARDABOUT

A Vampyre Story

John Broomhall talks to Pedro Macedo Camacho about composing for adventure games...



FORMATS: PC
DEVELOPER: Autumn Moon Entertainment
PUBLISHER: Crimson Cow

AUDIO TEAM:
Artistic Direction
 Bill Tiller

Original Soundtrack Composer
 Pedro Macedo Camacho

Sound Designer
 Julian Kwasneski (Bay Area Sound)

Audio Implementation
 Damian Kastbauer (Lost Chocolate Lab/Bay Area Sound)

What composer wouldn't jump at the chance to work with some key members of the development team responsible for the *Monkey Island* series, *Full Throttle*, *The Dig* and *Indiana Jones and the Fate Of Atlantis*?

Luckily for Pedro Macedo Camacho, he uncovered the ex-LucasArts connection whilst surfing the web one night. Stumbling across their site, he immediately recognised the art style of noted game *Curse Of Monkey Island*, and quickly followed his impulse to call them, as he explains:

"I absolutely love their work. I played all the *Monkey Island* games and the prospect of potentially working with a hero like Bill Tiller was really compelling. Obviously, I let them know how keen I was to get involved! The team believe music is vitally important in their adventure games and therefore, after what proved to be a careful and lengthy decision-making process, I'm delighted to say I got this wonderful gig."

Set in 1890s Europe, *A Vampyre Story* follows the fortunes of young opera diva, Mona, as she journeys home to Paris in search of fame and a cure for her vampirism, encountering a series of fantastic adventures en route.

Pedro started by reading the script several times. "I found the plot immediately inspiring – hilarious, too. I composed most of the music using Bill's awesome black and white sketches for reference – with such excellent direction, my job was greatly simplified. For the majority of game locations, I discussed 'keywords' and

descriptive terms I was aiming for musically, having seen his visuals. I'd get his input and then it was over to me to work independently and freely – a brilliant experience.

"In these kind of games, music is generally used everywhere, providing an atmosphere and mood for each scene – but it's also intended to give the player insights about the

"I just had to make a nod towards the roots of the team..."

Pedro Macedo Camacho

personality of the characters they're encountering, which is a fascinating challenge for a composer. In fact, there's a key melody associated with each key character and each game 'chapter' has an overall mood too. All the music is subtly linked – for instance, there are inverted harmonies, inverted main theme and main theme melody re-harmonization, as well as a smattering of motifs re-used throughout. Although this isn't massively obvious to the average player, it nevertheless gives an overall coherence to the soundtrack."

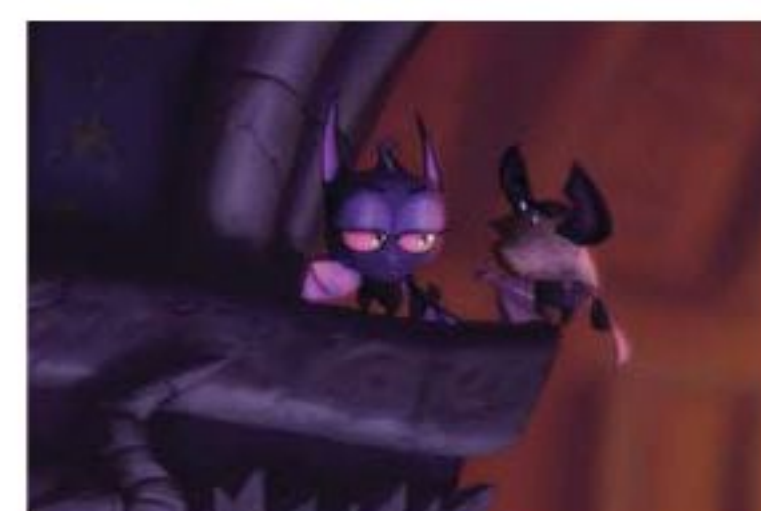
Style-wise, the score covers a lot of ground with Pedro carefully juggling references to the significant musical heritage behind the game, whilst

simultaneously aiming to create something truly original. "I just had to make a nod towards the roots of this team because I knew many *Monkey Island* fans like me would play the game. In some instances I opted for groove-based comic pieces rather than spooky orchestral and was also inspired by gipsy, folk and marching band music in some places.

"For the more diverse cues, I tended to be more explicit with the musical motifs to keep tying it all together. Even though the music is, to some extent, a stylistic and cultural melting pot, I still found my own voice in this game. I also kept an eye out for how sound would be used (even though the sound FX production came later) by using FX from my own libraries to indicate frequencies I should avoid.

"Technically, I didn't have the luxury of a full live orchestra so, over the course of the development, I re-made the music three times to keep up-to-date with the very best sample technology and libraries becoming available along the way, even tweaking the compositions to take best advantage of the newer libraries.

"I ended up using a lot of Project SAM's *Symphobia* mixed with some other commercial orchestral libraries as well as my own custom samples combined with live instrumental and vocal soloists. I guess doing three full iterations was a bit painful, but it was worth it – I'm really happy with the resulting sound and compositionally I wouldn't change a thing. It's been a privilege to be part of such an outstanding team."



Above: *A Vampyre Story's* distinctive visual style inspired Pedro Macedo Camacho



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Security Alarms

DRM technologies might not be popular with gamers, but content has to be protected regardless. **Ed Fear** speaks with some of the leading security tech providers to find out how to get players to accept DRM...

Anyone who likes to keep up to date with gaming blogs or forums won't have failed to notice a distinct rise in anger towards anti-piracy measures in PC games. Of course, it's nothing new – similar waves of disgust welcomed the music industry's attempt to regulate where and when its content was consumed, as anyone who remembers Sony's rootkit-installing CDs will attest.

Things have moved on slightly since then – modern security technology isn't quite so brute force as making discs unreadable on computer drives or refusing to install on machines with disc-burning software – but the sentiment amongst consumers has been less quick to change. *BioShock*, *Mass Effect*, *Spore* – all games that have launched to much fan-fare which quickly turned sour when gamers realised that new online licensing methods meant that they could only install their games a handful of times; all games where the publishers had to quickly issue apologies, patches or less restrictive usage terms.

So, getting it right is important. But how do you go about that when the only security gamers really want is none whatsoever?

"We have never been surprised by the various problems or concerns that many publishers have mentioned to us

from their experiences of digital rights management over the years," says Richard Wienburg, senior vice president of operations at Softwrap. "Many solutions have attempted to lock themselves deep within the operating system and, particularly now that Vista gives software less access to the OS, it has caused headaches for many."

"The only security gamers want is none whatsoever..."

The lack of surprise is shared by StarForce, itself one of the companies that's had the most vitriol directed against it. "I must say that personally I don't see anything strange in it," says Dmitry Guseff, multimedia PR manager for the Russian firm.

"The best protection for gamers is its absence. Some gamers simply don't understand the purpose of protection and its goals for overall game industry. Many gamers used to say that, regardless of the protection, it will still be cracked anyway – not realising that the main goal is to prevent appearance of illegal ISOs or cracked files during

first few weeks of a game's release. There is no need to hold forever."

It's this point that shows another slight change in the game DRM field – a shift towards protecting games before they even get to retail rather than locking down the discs themselves. The damage done by your game leaking three weeks before retail release – as in

a part that we consider 'high risk'. We suggest applying the Crypto-Box solution for beta releases, press pre-releases and other situations where the code has to be physically sent 'off-site' before the game is actually released in order to drastically cut the chances of any illegal pre-release code turning up on file sharing sites."

FALLOUT

So how has the furore affected the development and current form of DRM technology? Given its position at the nexus of the anti-DRM storm, StarForce is keen to mention the proactive steps that it has taken to address those concerns raised by gamers.

"We've made various changes: more information about what is being installed in users' systems, the ability to remove protection at any time, built-in help, an informative and easy-to-understand GUI, activate-and-forget methods, the possibility to quickly move e-licences from one computer to another, freedom to choose the way and protected programs launch, and finally fast and friendly technical support.

But, as Guseff explains, their efforts are not just a reaction to the previous controversies, but also reacting to current concerns and popular opinion.

Halo 2, or more recently Bethesda's *Fallout 3* – is, some say, far more troublesome.

Marx Security is a company new to the games scene, but sees a gap in the market for protecting pre-release code sent to beta testers, journalists and disc replication plants – outlets often fingered as being the source of premature leaks. Its Crypto-Box solution brings the USB dongle method often used on more expensive applications to games, as CEO Philipp Marx explains.

"The pre-release phase is a very important part of the development and production process for any new IP and is



To that extent, StarForce created a special division, which it calls the End User Department.

"Its main task is to track what is going on throughout the Internet concerning game protection, users' reactions and opinions. All information is accumulated and sorted by marketing, and then based on that we plan how to improve our solutions and make them more comfortable for users without reducing reliability for rights holders."

But, some say, changing their practices can only be one part of the approach – gamers must also be educated about why DRM is necessary, and how piracy impacts future development efforts. And, as everybody who's been forced to sit through a patronising warning or pre-emptive

telling off before watching a DVD can attest, that's easier said than done.

"On our side, trying to change the perception of DRM through the offering of more seamless and flexible licensing is probably the key to changing general attitudes towards protected games," says Softwrap's Wienburg.

"Publishers need to communicate to consumers that they need to expect to pay for their games. Many publishers are beginning to offer their games for 'free' in return for an incentives sign-up offer – like, say, open a Blockbuster account and get your game for free. This concept may sound great to help convert visitors into licensed customers, but they are sending out the message that their games are worthless and you shouldn't have to pay for them. This is



Bioshock (left) and Spore (right) are examples of two games criticised for restrictive DRM

something we need to watch out for as it could be quietly destroying the value of the games industry and eventually lead us to fight the same battles that the music industry is currently facing."

The need to educate consumers is something that StarForce agrees with – although, it says, that should extend to telling people exactly what security tools are being installed, what they do and, perhaps most importantly, how to get rid of it.

"First of all, developers and publishers need to communicate with users to explain why protection is needed. Also, it's vital to allow users to learn more about what kind of protection is implemented in the game and how it operates, and to provide users with common protection problem

FAQs and methods of protection removal. The more info you disclose, the less questions you receive after."

Marx is perhaps more realistic: "Home entertainment, whether it's games, movies or music, has an intrinsic value and there are always going to be people that want to sidestep the normal channels and avoid paying. I would suggest that gamers need to be made more aware of the problems of games piracy, and the effect it has on their passion."

"Pirated software has a detrimental affect on future games production, but most players don't fully realise this, and have no concept of how they are affecting the future of gaming by downloading illegal versions of the latest games."



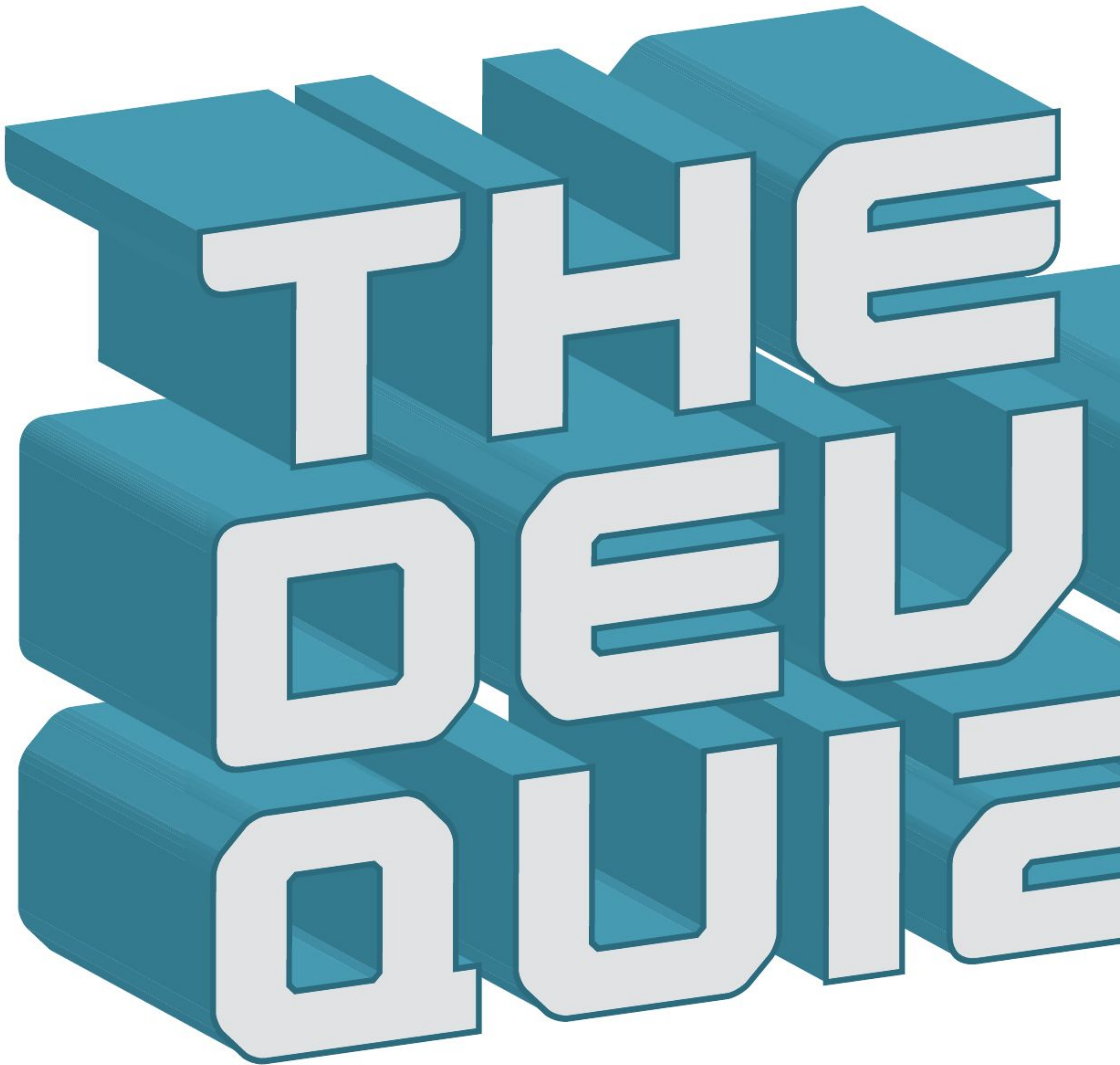
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Studio News

This month: Game Republic, Jagex, Razorback...

Long-time games journalist Jamie Sefton has joined Yorkshire game development body **Game Republic**.

Sefton, previously of Future Publishing and also Dennis Publishing, has spent ten years in the games press, editing *PC Zone* for two years and contributing to magazines such as *Official Nintendo Magazine* and *Official Xbox 360 Magazine* and websites including CVG.co.uk.

"I am delighted to join Screen Yorkshire at a time when strengthening the region's games sector is a key strategy in the screen agency's future," said Sefton.

"I look forward to playing an integral part in the delivery of this strategy, combining my passion for videogames and God's County."

www.gamerepublic.co.uk



Jagex has hired Vince Farquharson as its new head of *RuneScape*.

Farquharson was formerly creative director and development director at THQ, a position he held for three years. Prior to that he also worked at Empire Interactive, Computer Artworks and Bullfrog. He has overseen titles as diverse as *MotoGP 06* and *07*, *Worms: Open Warfare*, *Warhammer 40,000: Squad Command* and *Broken Sword: The Angel of Death*. His new focus will be on expanding *RuneScape* in terms of content and also seeing the game into new territories.

"Vince brings a wealth of industry experience, making him the ideal candidate for head of *RuneScape*. We see him as a fantastic addition to *RuneScape*, at a time when the game is surging in popularity," said Geoff Iddison, Jagex CEO.

Farquharson added: "I'm absolutely thrilled to be joining the *RuneScape* team. I've watched for several years as *RuneScape* has evolved into a phenomenal success with millions of players. I'm very excited to be working with the team responsible for this, as we take the game forward into 2009 and beyond."

www.jagex.com



Handheld specialist **Razorback Developments** has welcomed Mirco Pinna to its team.

Pinna joins the company as an artist, and is new to the games industry. Previously he worked in the TV production industry as a 3D modeller, animator and storyboard artist.

"Mirco has already proved to be a useful member of the team and I'm very pleased to welcome him on board," said David Leitch, managing director at Razorback. "I'm sure he will have a positive impact on the exciting new projects we have in development."

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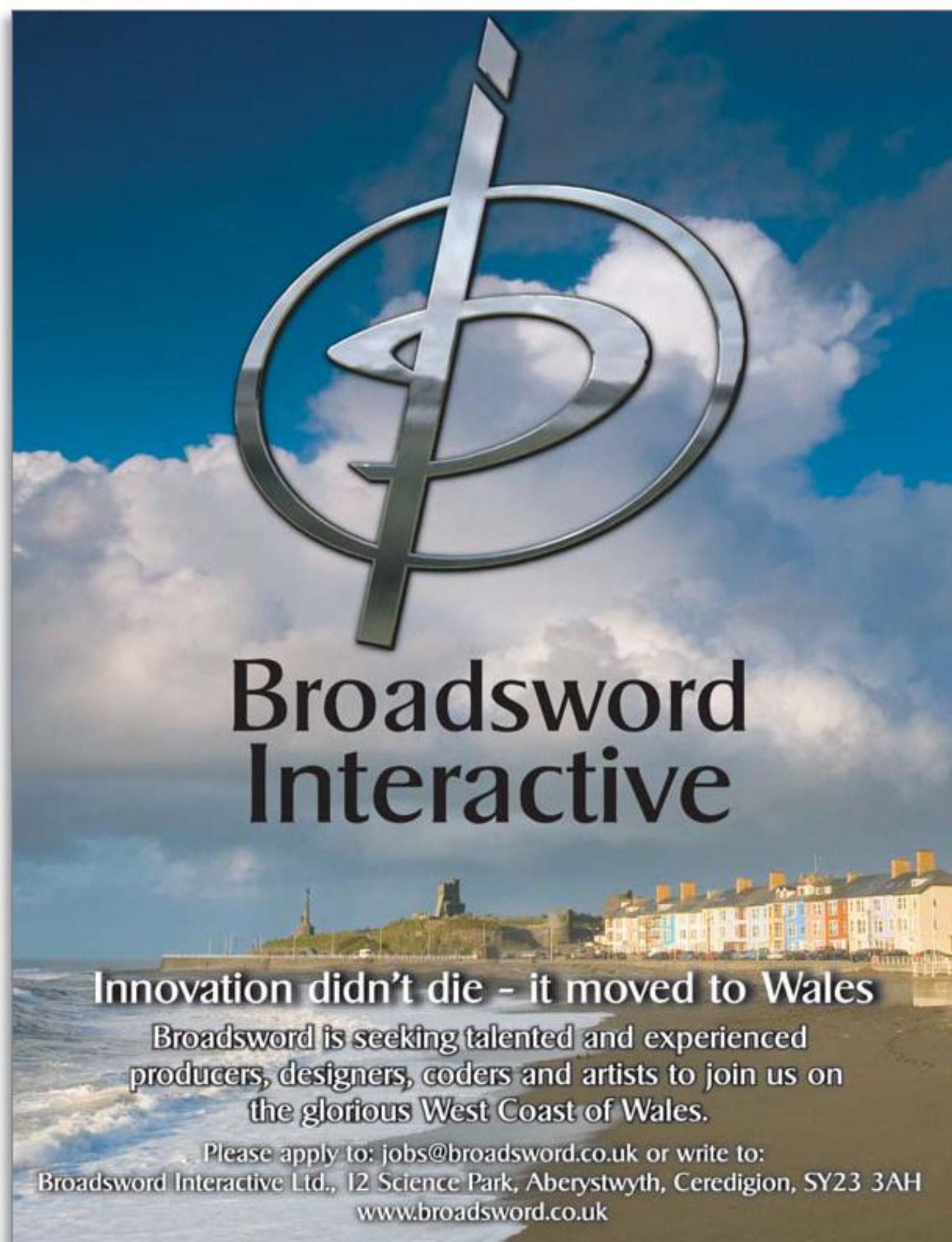
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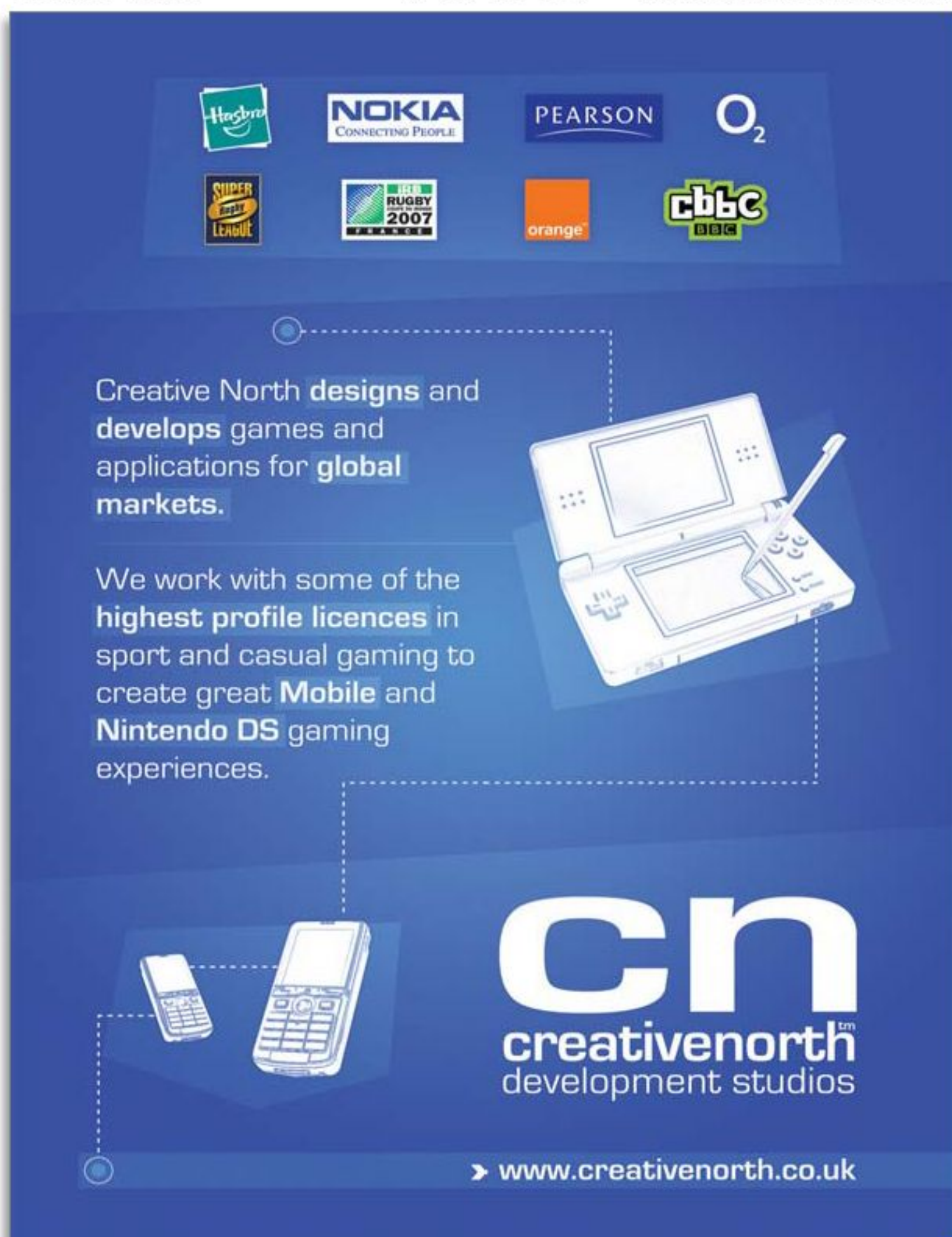
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Tools News

SpeedTree sprouts new licensees



IDV has announced a bumper crop of new licensees for its SpeedTreeRT foliage-generating middleware.

The technology is being used in Sega's forthcoming tactical action RPG *Valkyria Chronicles* and Funcom's *Age of Conan: Hyborian Adventures*. It's also being utilised in *Sacred 2: Fallen Angel* by Ascaron, *Sky Gods* by BlackFoot Studios, Bongfish and Destineer's *Stoked* and Microsoft's *Virtual Earth 3D*. Developer Torus Knot has also created OGRESpeedTree, an integration for SpeedTreeRT into the open-source graphics engine OGRE.

"*Valkyria Chronicles* will reward players with both amazing gameplay and a first-rate environment," said Ryutaro Nonaka, producer at SEGA. "SpeedTree is a very important part of the game's graphical excellence."

Pål Frogner Hansen, project director for *Age of Conan*, added: "In every land we created for the game, we faced a series of crucial decisions about the foliage."

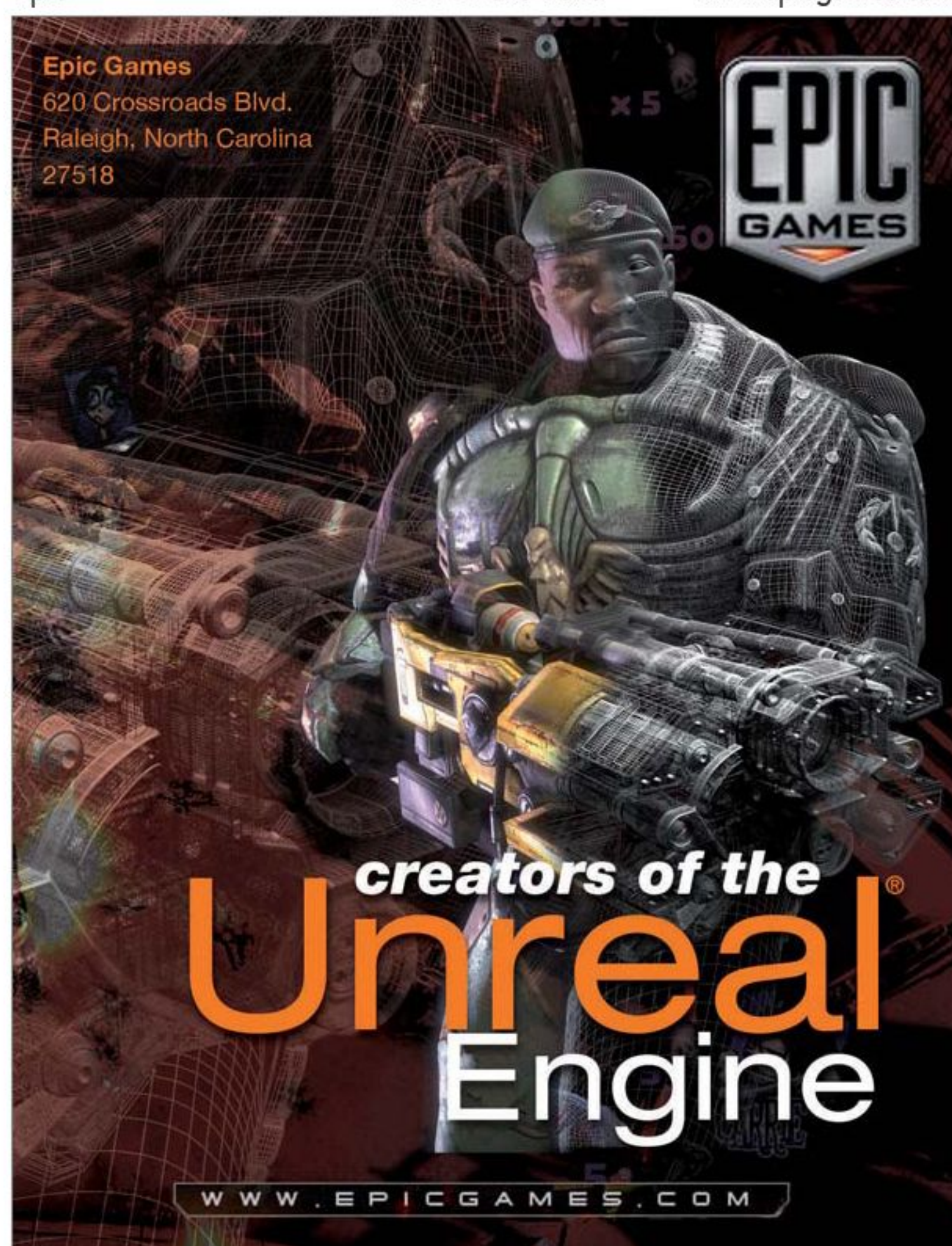
"We custom modeled a number of trees to match Robert Howard's dark vision. SpeedTree made it easy for our artists to experiment with tree shapes, textures, root structure and more, quickly scrolling through extensive variations until they achieved just the right look and feel. If Conan himself could walk among the trees we've created for him, we think he'd be right at home."

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audiokinetic

Announced by Audiokinetic at the London stop of its Wwise tour, SoundSeed is a family of interactive sound generators that enables audio designers to use a single 'footprint' sample to generate unlimited variations using DSP technology.

"One of the challenges that still remains [for audio designers] is memory limitations," said Jacques Deveau, audio program manager for Audiokinetic. "There's still a ridiculously low amount of memory available for audio content. So, we thought that for the first iteration it would be good to create a plugin to help overcome those limitations by introducing a lot more variation with the SoundSeed technology.

"Secondly, on the creative side, it also allows you to exceed other limitations - if you're recording source sounds, you're obviously limited to physical sounds that you can capture, but once you capture those into SourceSeed you can modify the properties and really push the limits creatively."

The technology currently functions as a plug-in to Audiokinetic's Wwise sound engine, although the company does foresee other possibilities for the tech. "There's basically two parts - the Modeller tool is an external tool that generates content, and currently that's exclusive to Wwise, and then there's the runtime. But we also foresee other applications, other uses, beyond Wwise - but right now for the initial release it's an audio effect in Wwise," he said.

The first product to be launched under the SoundSeed banner is SoundSeed Impact, which is specifically geared towards impact sounds such as sword clashes and footsteps. Further specifically tailored modules are definitely on the agenda for Audiokinetic. "We foresee lots of different types of modules down the road as well," Deveau continues.

"It's technology that we're developing, and the advantage we have is that we can research and develop technology that's specific for the type of synthesis that we want to do.

"We have the flexibility to pick the technology to meet the requirements. I'm not exactly sure about the frequency, but we definitely want a couple of modules available, and it'll be relatively quick - it's not going to be years between releases."

Explaining how the technology works, Deveau talked about how the Modeller analyses source sound files for 'resonant modes' - imagine the pure tone from hitting a wine glass with your finger - and extracting them from the file. "It then creates a model which provides you with the ability to recreate that. So the output of the modeller is what we call a residual sound - all the sound with the resonant content removed, essentially just noise, and a data model.

"That's what you load into Wwise at runtime: you load the residual file, apply the sound sheet, load the model, and then you have the ability to transform those modes in frequency and magnitude. That's what you're doing in runtime to create the variations; you're modifying that modal information," he added.

And while the tech was only revealed to the public recently, one UK studio has been testing it out already, with great results. "Realtime Worlds' original feedback was great - they said it delivered the promise of reducing the memory footprint. They had a lot of variations that were taking up a lot of memory, so they were really happy to use it. They were really excited to get on board early and try it out, and they've been really happy with it so far."

www.audiokinetic.com

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Services News

Testronic's new senior staff



QA and localisation firm **Testronic** has made two new senior appointments as part of its rapid expansion.

Gary Johnson has been appointed as the company's new chief financial officer, having previously worked at Venom Games, Take Two, Climax, Rage Games and Sony Psygnosis.

The firm has also hired Arnaud Messenger as its new service line manager for localisation QA. Messenger previously worked at Eidos for seven years in various QA roles, most recently as localisation QA supervisor. He'll be in charge of managing all localisation QA services, continued development of team procedures, hiring new staff and key accounts.

"Gary Johnson is a welcome addition to our team, not only for his financial acumen, but his considerable experience of the games industry," said Neil Goodall, CEO of Testronic Labs.

"I am certain that Gary's knowledge in this area will prove invaluable, supporting our strategy of providing market leading quality assurance services to global games developers and publishers."

He added: "We are delighted to also welcome Arnaud to Testronic Labs. His experience and skills are a valuable addition to the strengths of our existing team, and the new and improved structure will enable us to provide a greatly enhanced service to current as well as future clients."

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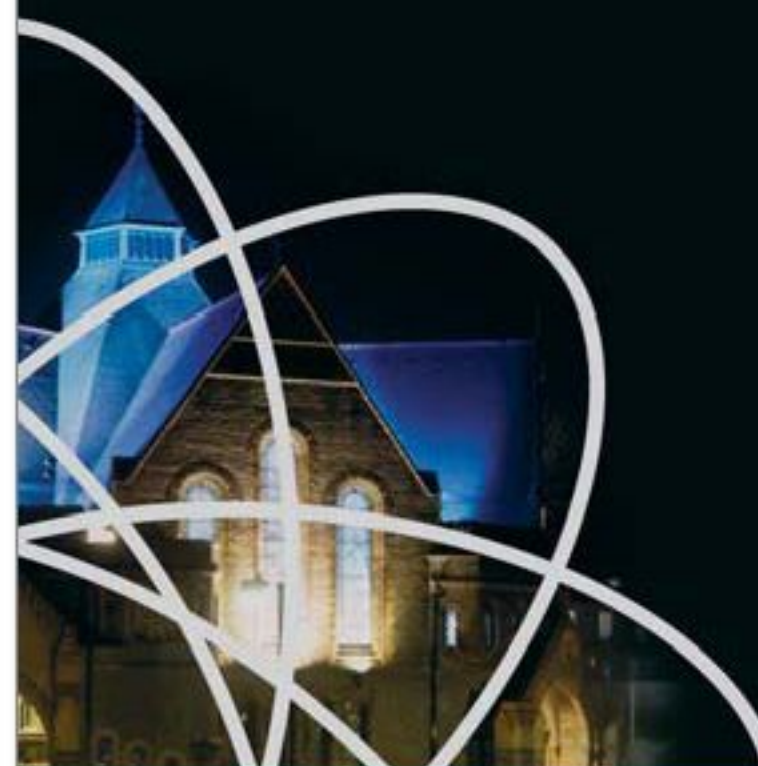
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Training News

Escape launches online platform



Escape has launched a new online learning tool for those looking to get to grips with Maya that lets students log on and view classes from anywhere in the world.

The online learning tool is designed to let entry-level students or those looking to refresh their skills the chance to join classes no matter where they are. The system is also open to academia and allows users to put together a tailored course that matches their skillset.

Escape Studios' CEO, Dominic Davenport, commented: "Training the next generation of CG creatives via the internet is a very exciting development for us and for the industry. The superb new training software has been designed to be as useful for those picking it up for the first time as it is for experienced professionals who know what they want."

The company has also recently opened a New York office, helmed by Ed Caracappa, former director of business development at BOXX. Initially operating as a reselling department, it also plans to open a recruitment department at the new office by the end of the year, helping trainees find work in the industry.

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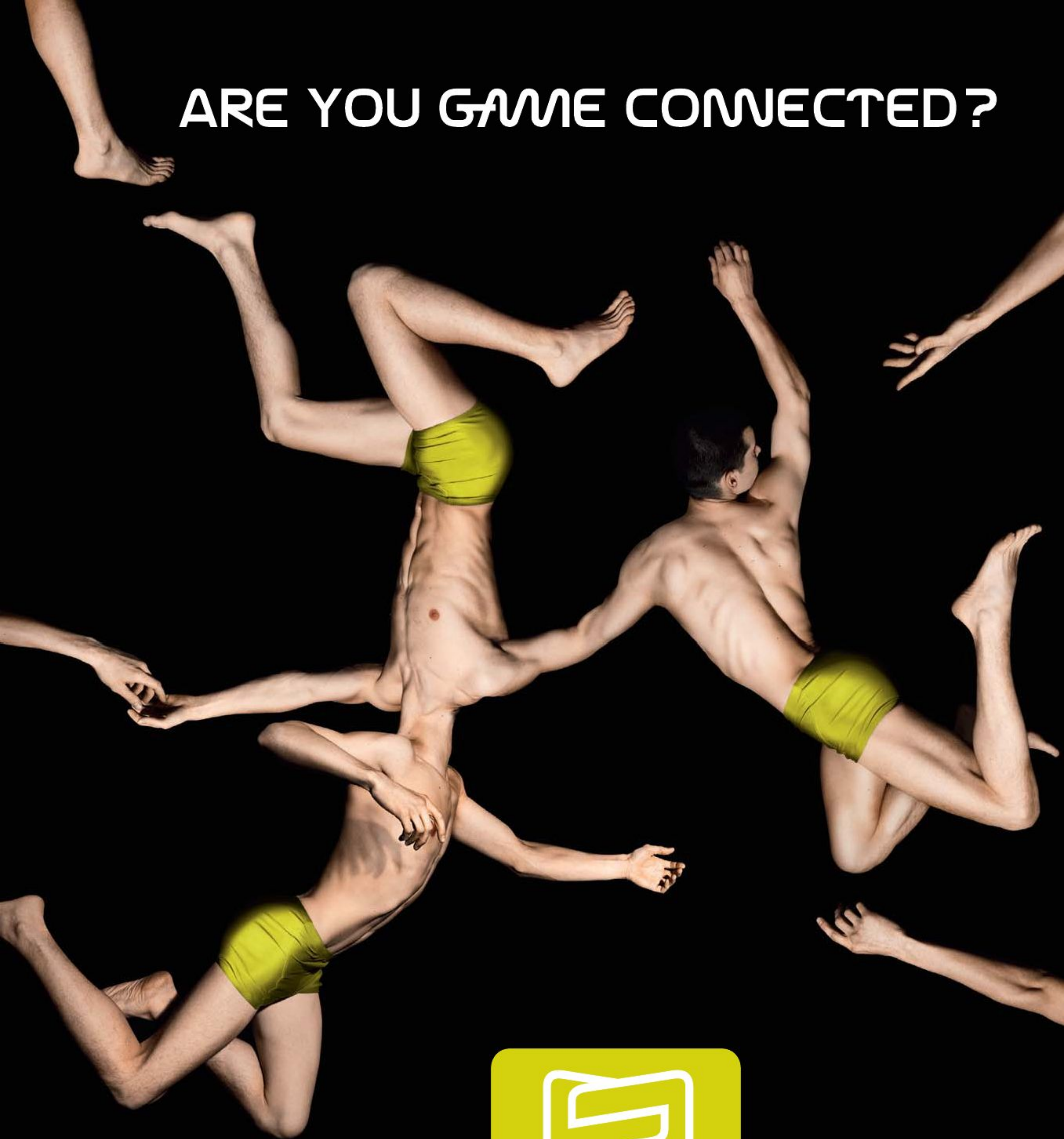
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THE BYRONIC MAN

A word of warning: **Simon Byron's** easily led...

I've dreaded this moment, even though it would obviously come. I've had all this time to conjure up an excuse – favourites being: "I was just joking", "I was drunk" or "I thought I was on the Internet so kept going with it in spite of irrefutable evidence to the contrary, and anyway who cares if I argue with someone I've never met, it's not as if they're going to come round my flat above the pub and stab me to death is it?" But at some times in our measly lives we need to stand up and be counted, and admit who we are.

So here goes: One. Wrong.

In a column last year I argued that demos were essentially pointless, and that I'd never been convinced to spend actual money as a result of a trial version. I was always going to buy the game or not, never swayed by the potential of a demo. But last month, up popped Black Rock Studio's *Pure* demo. Rather than re-activate my Xbox Live account in order to download what amounts to an advert, I opted for the free PlayStation version – and was so impressed by its blend of four-wheeled stunt-fuelled racing I decided to shell out thirty-five pounds of actual money for the full version.

The demo convinced me the game would be a light-hearted breeze through fantasy race courses on make-believe vehicles, so I was a little unprepared for the sombre warning which occupies the screen upon every

"Let's blame 'Legal' – the division of every major publisher whose job is solely to stop people having fun..."

single load. It reads: "WARNING – The trick-racing experience in this game is pure fantasy; do not try these moves in real life."

Now, I know the industry is still debating ways in which our games should carry consumer warnings, but this is clearly taking things too far. It's a fantasy race game. Unless the average PlayStation 3 owner has access to military quad-bike technology and the ability to bend the laws of physics at will, the closest they're likely to get to emulating the feats in *Pure* is attempting a bunny-hop off a kerb, or pulling off an "endo" – two things even I've not been brave enough to try in real life anyway.

There are idiots out there, of course, but "don't kill each other with claw hammers" would apply to more people playing videogames than this.

I think we can blame 'Legal' – the division of every major games publisher whose job is solely to stop people having fun. Imagine a world where *Pure* sets a precedent. We can expect to see more of these warnings propagating games which should be fun, like the squares at school who'd hang off your shoulder saying "I don't think you should do that". (That said, they were right – the school gym did burn down.)

PES 09: WARNING – those expecting the *Pro Evolution* series to have moved with the times, or learnt from criticisms of previous versions will

be incredibly disappointed; yes, you should have bought *FIFA* this year.

Rock Band: WARNING – instruments will break on use.

Saints Row 2: WARNING – did you mean to buy *GTA*?

Gears of War: WARNING – you will be able to walk past walls in real life without sticking to them, and homoeroticism isn't usually this homoerotic.

Mercenaries 2: WARNING – bears no actual resemblance to the TV ad, so if you bought it because of that you're likely to be sorely disappointed.

Of course, where we lead, others follow – but I'm hopeful this sudden display of publisher honesty won't extend to other media. I'm looking forward to the new James Bond film, but I doubt that'll kick-off with a reminder that none of the things you'll see should be attempted because you lot watching aren't James Bond. I can't see the fiction section of Waterstones racked under a sign saying "Warning: Fiction". Nor Katie Perry's debut single ever displaying a sticker saying: "She just pretended to be a lesbian so people would write about her."

Games are about escapism. In this golden age of high-definition, we bang on about our realistic visuals. So let's embark on the journeys that only games permit, and forget such worthless reminders at the point of departure.

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develop FORWARD PLANNER

DEC 08 / JAN 09

Publication date: December 15th

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- Game studios in London
- QA, Testing & Localisation

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GDC 2009 - Special Issue

Events: GDC 2009, Game Connection America

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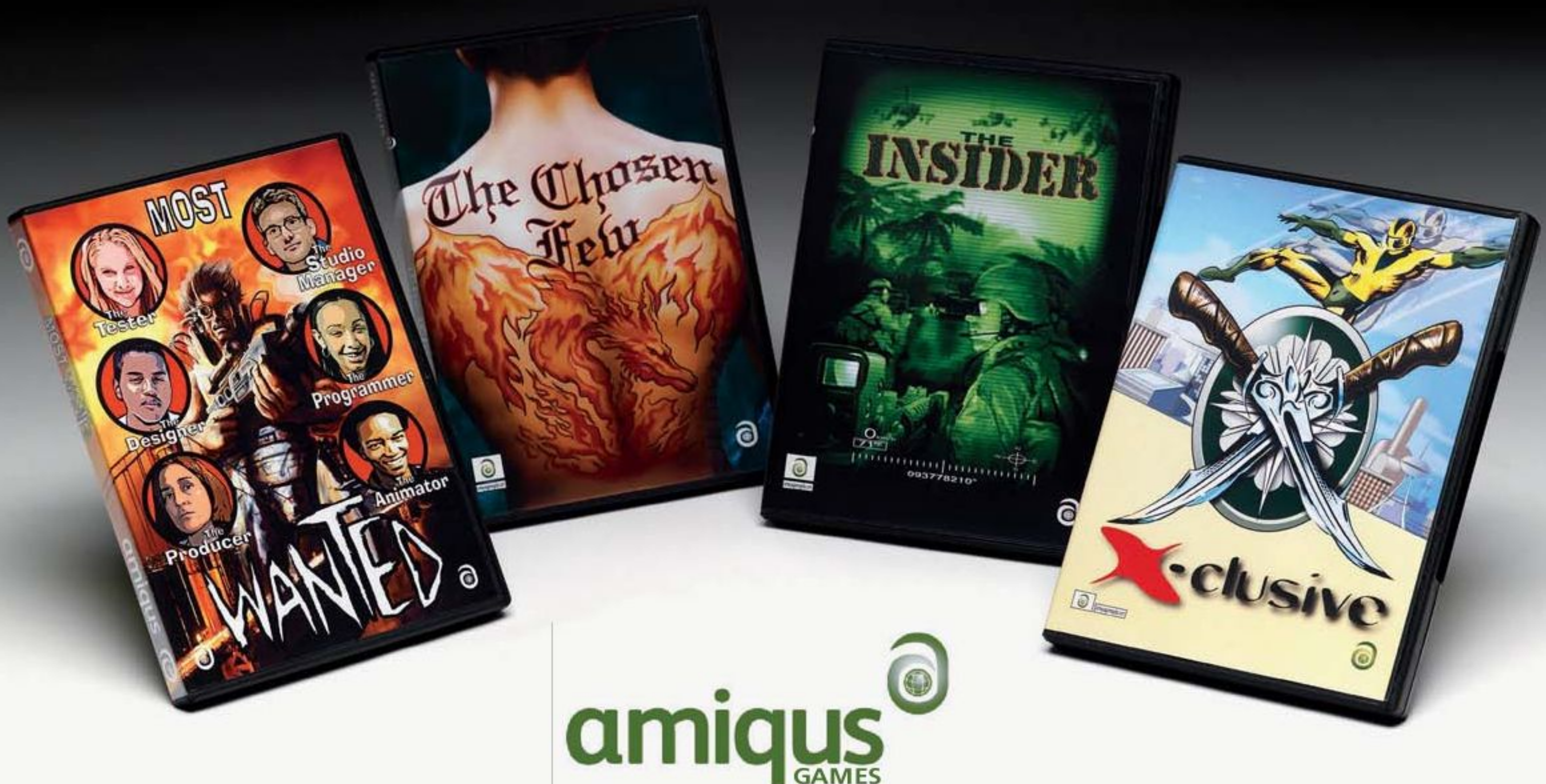
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Our brief at Flix was to create CGI elements for Entertainment Rights new series of Postman Pat SDS. Working closely with Cosgrove Hall Films we ensured a seamless blend of stop motion animation and CGI. Flix CGI utilised a combination of Autodesk® Maya® and 3ds Max® to craft vehicles and environments.

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